

Workforce Housing Program

Portal Training Manual

Use of the Workforce Housing Portal is **mandatory** for tenant submittals on or after **February 1st, 2026**. Tenant submittals via email to PZB-WHPRentals@pbc.gov will no longer be accepted thereafter.

For any questions or issues, please contact WHP staff at PZB-WHPRentals@pbc.gov or call the Palm Beach County Planning Division at (561) 233-5300. You can also visit our county website at <https://discover.pbcgov.org/pzb/planning/Projects-Programs/WorkforceHousingProgram.aspx>.

For any inquiries sent to PZB-WHPRentals@pbc.gov, please include the community's name in the subject line, and identify the specific issue, unit, and tenant name in the email.

Under Florida law, e-mail addresses are public records. If you do not want your e-mail address released in response to a public records request, do not send electronic mail to this entity. Instead, contact this office by phone.

WHP Portal Overview

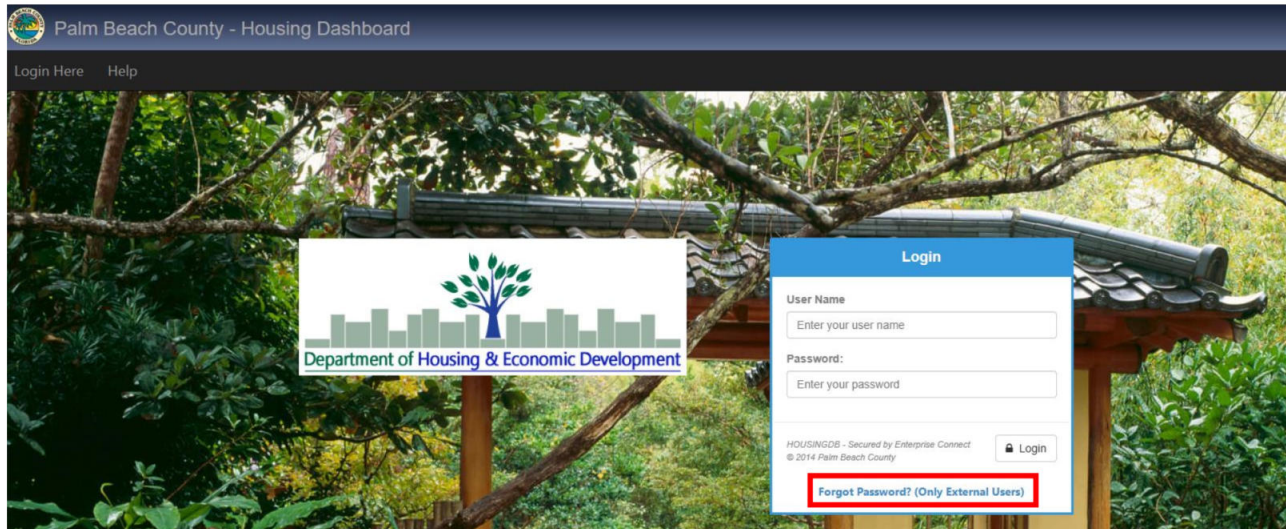
The Workforce Housing Portal is a new tool developed by Palm Beach County to assist both Property Managers and Workforce Housing Program (WHP) staff to provide tenant information, track units, and maintain compliance. The Portal allows Property Managers to enter new or renewing tenants' information and receive automated notifications of acceptance, expiring leases, and noncompliance comments.

The Portal also facilitates WHP unit tracking for the Property Manager, allowing the Property Manager to view all WHP units in one place and receive notifications for upcoming lease end dates. Ultimately, the objective is to make this as easy as possible for Property Managers all while ensuring that the project meets its obligations.

Starting February 1st, 2026, the Portal will be mandatory for all tenant submittals. Any email submissions to PZB-WHPRentals@pbc.gov will no longer be accepted after February 1st, 2026.

Portal Access:

Access the WHP portal here: <https://pbc.gov/housingdashboard/>



Login and Password

First time users:

- Contact staff through email to request a profile: PZB-WHPRentals@pbc.gov
- Provide the first and last name, email address, and community name
- Once the user is added to the database, you will receive email with a temporary password

If you have an account:

- Your email address is your login username
- You should have set a password previously
- To create a new password or if you lost your password, please use the “forgot password” option on the landing page

If you would like more than one user to access the portal:

- Provide the first and last name of employee(s) and their email address to staff through email along with the community’s name

Portal Access Changes:

- Update PBC Staff as soon as possible if there has been a change in Property Managers, to ensure that access to the Portal is maintained

Dashboard- Overview

Once you log into the Portal, you will be directed to your landing page/dashboard screen which looks like the following screenshot below.

Jurisdiction	City	Project Name	WHP Units Obligation	LOW	Mod1	Mod2	Mid	Occupied	Available	Occupancy Rate	Submitted	Returned	Action
Palm Beach County	WEST PALM BEACH	Sample Project 1	11	1	3	2	1	7	4	64%	3	2	

Occupied	Available	Occupancy Rate
7	4	64%

This provides an overview of the WHP at the Property. The number of “Available” units reflects the difference between the WHP obligation and the number of occupied compliant units.

Dashboard- Tenant Information

The dashboard allows you to see the status of all WHP tenants, and to access tenant information for individual tenants. To begin, click on the name of your Project (Development Name).

Project Name	WHP Units Obligation	LOW	Mod1	Mod2	Mid	Occupied	Available	Occupancy Rate
Sample Project 1	11	1	3	2	1	7	4	64%

Below is the dashboard view for a project:

Tenants Search

Project Name:

Sample Project 1

Expired Lease

Subject to Utility Allowance requirement

Summary for January:

Total Occupied: 7

Vacant units: 4

Occupancy Rate: 63.64%

Required Units: Low: 2; Moderate 1: 3; Moderate 2: 3; Middle: 3

Occupied Units: Low: 1; Moderate 1: 3; Moderate 2: 2; Middle: 1

Export list of tenants

Tenant ID	Unit	Tenant Name	Bedrooms	Leasing Start Date	Leasing End Date	Income Category	WHP Certi. Date	Income at Certi. Date	Status	Document	Action
3165	159	Tenant 15	2	01/15/2026	01/14/2027	> 60-80% of MFI	01/15/2026	80000	Not accepted		
3157	208	Tenant 11	2	05/25/2025	05/24/2026	> 30-60% of MFI	05/25/2025	58000	Not accepted		
3169	109	Tenant 2	3	12/12/2025	12/11/2026	> 80-100% of MFI	12/12/2024	100000	Submitted		
3168	222	Tenant 16 and Tenant 17	2	01/15/2026	01/14/2027	> 100-120% of MFI	01/15/2026	120000	Submitted		
3163	158	Tenant 14	2	01/18/2026	01/17/2027	> 100-120% of MFI	01/15/2026	125000	Submitted		
3156	308	Tenant 10	1	05/01/2025	04/30/2026	> 80-100% of MFI	05/01/2025	87000	Accept		
3155	206	Tenant 8	2	03/25/2025	03/24/2026	> 120-140% of MFI	03/25/2025	125000	Accept		
3154	115	Tenant 12	1	07/01/2025	06/30/2026	> 80-100% of MFI	06/25/2025	85000	Accept		
3152	301	Tenant 13	2	07/29/2025	07/28/2026	> 80-100% of MFI	07/29/2025	111000	Accept		
3151	345	Tenant 9	3	04/18/2025	04/17/2026	> 100-120% of MFI	04/18/2025	111000	Accept		
3149	201	Tenant 1	2	12/28/2024	02/27/2026	> 60-80% of MFI	12/28/2024	73500	Accept		
3147	398	Tenant 5	3	01/25/2025	01/24/2026	> 100-120% of MFI	01/25/2025	111256	Accept		

1100

Displaying items 1 - 12 of 12

The large blue bar at the top provides a snapshot summary of the current date and month, including vacant units, occupancy rate, required WHP obligation units within each income category, and compliant occupied units within each income category.

The rows below allow you to see the status of all WHP tenants at a glance. *For developments that are just starting to lease, the tenant information screen will show no tenants. For developments that are actively leasing, the screen will display a list of active (non-expired) leases.*

You can toggle the button at the top to see expired leases, which will show up in red. You can see the status of each tenant on the right, and you can view their documents by clicking on the blue paperclip, etc. *(Tips: Sort units in order by clicking on unit #. Later in this manual, instructions are provided for Viewing and Downloading a List of Current Tenants.)*

Preparing to Add a New Tenant

Before entering the tenant information, you should:

- Have already filled out both the Lease Addendum and WHP Rental Calculation Worksheet per the instructions in Part I of this manual, signed, dated, and every line filled out. A digital copy/scan of **these documents should be saved using the naming conventions outlined in Part I of this manual**, and should be ready to be attached during this step. You should also save these documents in your own files for your records.
- Review the list of current and past tenants in the Portal to confirm that the unit is/was unoccupied at lease start date. You can toggle the “expired lease” button at the top to see expired leases. Scroll on your list of WHP tenants to see if the unit # is shown as occupied. **If there is a WHP tenant in that unit # and lease dates overlap, contact WHP staff to update lease end date to match move-out date for prior tenant.**

Adding a New Tenant - No Overlap

Once you have checked that there are no overlapping leases, continue to add the new tenant profile. Click “add tenant” at the bottom of the screen and proceed to fill out the information on the pop-up screen.

Tenants Search

Project Name:

Sample project 1

Expired Lease

Summary for July:

Total Occupied: 8 Vacant units: 4 Occupancy Rate: 66.67%
Required Units: Low: 3; Moderate 1: 3; Moderate 2: 3; Middle: 3
Occupied Units: Low: 5; Moderate 1: 2; Moderate 2: 1; Middle: 0

Tenants Data Entry

Export list of tenants

Tenant ID	Unit #	Tenant Name	Bedrooms	Leasing Start Date	Leasing End Date	Income Category	WHP Certf. Date	Income at Certf. Date	Status	Document	Action
1850	203B	Tenant 4	1	05/01/2025	05/30/2026	> 80-100% of MFI	02/15/2022	65500	Not accepted	(0)	
83	101B	Tenant 11	2	07/15/2025	07/24/2026	> 80-100% of MFI	05/10/2023	83200	Submitted	(0)	
1852	207B	Tenant 2	2	05/01/2025	06/30/2026	> 60-80% of MFI	04/24/2025	69950	Accept	(2)	
1851	301A	Tenant 12	2	05/01/2025	06/30/2026	> 60-80% of MFI	04/24/2025	65220	Accept	(2)	
90	209B	Tenant 6	2	01/21/2025	01/31/2026	> 60-80% of MFI	01/29/2025	69420	Accept	(0)	
89	102B	Tenant 5	2	08/29/2024	10/31/2025	> 100-120% of MFI	06/29/2023	95560	Accept	(0)	
88	308B	Tenant 10	2	07/12/2024	09/30/2025	> 60-100% of MFI	05/12/2023	89352	Accept	(0)	
87	303B	Tenant 7	1	06/14/2024	06/30/2025	> 60-80% of MFI	06/14/2024	73824	Accept	(0)	
86	303A	Tenant 8	1	06/04/2024	08/31/2025	> 80-100% of MFI	02/04/2022	66000	Accept	(0)	
85	208A	Tenant 9	1	05/05/2024	07/31/2025	> 60-80% of MFI	01/05/2022	30000	Accept	(0)	
84	203B	Tenant 4	1	06/15/2024	04/30/2025	> 60-100% of MFI	02/15/2022	65500	Accept	(0)	
82	203A	Tenant 3	1	07/01/2024	08/31/2025	> 60-80% of MFI	05/01/2023	68880	Accept	(0)	
81	107B	Tenant 5	2	04/14/2024	04/30/2025	> 80-100% of MFI	03/05/2024	72240	Accept	(0)	
80	105A	Tenant 1	1	12/29/2023	02/28/2025	> 80-100% of MFI	02/02/2024	80898	Accept	(0)	

1100

Displaying items 1 - 14 of 14

Add Tenant

Occupancy Report

Reset Sorting

Bldg #: Unit #: No of Bedroom(s):
 Unit is required. Bedrooms is required.

Lease Holder Name:
 Tenant Name is required.

Leasing Start Date: Leasing End Date: WHP Certification Date:
 Start date is required. End date is required. Certification date is required.

Household Income: Income Category:
 Income is required. Income category is required.

Monthly Rent: Rent is required.

Mandatory Fees

Trash: Fee 2: Fee 3: Fee 4:

Total Monthly Rent:

Applicable Utility allowance: WHP rent per worksheet

Additional Concession/Discount:

Max WHP Rent per the applicable WHP rent schedule: WHP Schedule

Required Utility allowance: Max WHP Rent in effect reduced by Applicable Utility Allowance

Tenant Type: New tenant ☒ Overcharge: Document to upload:
 Renewing tenant WITHOUT re-certification: ☐
 Renewing tenant with re-certification: ☐
 Other event: ☐

For one lease holder: Add their first and last name.

For multiple lease holders (do not include children): List each of their **last** names.

Bedroom number: Please enter 1, 2, 3 and 4 for 1-bedroom, 2-bedroom and etc. units, respectively. Enter "0" for Studio type units.

WHP certification date: This is the date on the lease addendum when the Property Manager signed/confirmed the tenants' household income. The income is assumed to be accurate on that date unless otherwise specified as a note. (Please see section for pre-leased units or certifying income at time of lease start date if certification happened at a later date).

Household income: Enter the total household income, rounded to the nearest dollar.

Income category: Please check the income schedule that was in effect at time of income certification and manually select income category from drop down. If a unit was pre-leased at the prior year schedule, manually adjust to the correct income category to match the lease addendum document. (Tip: The link to the current schedule is provided under the blue paperclip "WHP Schedule". For schedules from prior time periods, please contact WHP staff.)

For communities that are required to use 8 subcategories for pricing, manually select correct income range from the drop down. If you do not know if the property is required to use 8 subcategories, please contact WHP staff or consult the Restrictive Covenant for the property that was provided to you at the training prior to lease commencement.

Monthly rent: Enter the base rent per the tenant's lease.

Mandatory fees: Enter all mandatory fees. We pre-set a trash fee as it is a common fee.

If you do not charge a Trash fee, leave the fee at \$0. Fees 2- 4 can be for any other mandatory fees. Please ensure that all fee descriptions are clearly listed on the WHP Rent Calculation Worksheet and that the amounts match the amounts on the RCW.

Applicable utility allowance:

- If your development is **not subject to the utility allowance** – Required/provided Utility Allowance fields are inactive.
- If your development is **subject to the utility allowance** – Enter the applicable amount:
 - \$50 for 1- and 2-bedroom units
 - \$75 for 3- and 4-bedroom units
- If the applicable **utility allowance is “built in”** the rent– the “monthly rent” is already reduced by \$50 or \$75--then enter “0”.

Max WHP rent: the Max WHP rent is the highest rent in the tenant’s income category you can charge them, per the rent schedule that is in effect at lease execution. Although this field is active for Property Managers, it is not mandatory. You could enter the Max WHP rent based on the income category and unit size and the WHP Income/Rent schedule in effect at time of lease execution or leave it as “0”. Staff will enter correct Max WHP rent during compliance review. However, you can open the WHP schedule using the paperclip link on the right in blue to view WHP Rent/income schedule that is in effect.

Documents to upload: Attach the RCW and LA here, press save (**please note there is 20MB file size limit for attachments**).

How to reduce file size: Open the PDF in Adobe Acrobat, go to the Tools center and click on the Optimize PDF Tool, choose a file to compress and select Reduce File Size, pick the file version compatibility and rename the file, save the compressed PDF to your desired location or use “print to PDF” option. If you are using a different PDF software, please find similar instructions to reduce file size or to convert to a PDF.

Once the screen is filled out and the documents are attached, review the information to confirm that it matches the physical documents, that the correct income category has been selected, and that the tenant is not being overcharged based on the max WHP rent schedule.

When you are finished, **press submit**. (*Tip: the save button will save the file in “draft mode” which is not sent for sufficiency review yet and only you as the Property Manager who entered it can see it.*)

Month to Month Tenants

For month to month (MTM) tenants, please add “(MTM)” in the Leaseholder Name field at the end in parenthesis. For lease end date you can enter a date up to 6 months out, but no later than through the end of the quarter following the lease start date.

Example:

Lease Holder Name:*	Perez (MTM)				
Leasing Start Date:*		1/7/2026	Leasing End Date:*		6/30/2026

It is Property Manager’s responsibility to send emails **every three months** to WHP staff confirming that the tenant(s) is still in the unit and paying rent as indicated on the WHP Rent Calculation Worksheet. Based on the confirmation staff will adjust lease end date to add three months. Again, after another three months the Property Manager should contact WHP staff to confirm status of the MTM tenant until they move out.

Tenant Status

Status
Not accepted
Submitted
Accept
Accept

Submitted- Documents submitted, unit is pending/under review.

Not Accepted- Unit is not compliant/denied, shown in bright red. The unit was not deemed compliant due to insufficient or inaccurate documents, non-compliant rent, ineligible tenant, wrong income category selection, change in income, etc.

Accept- Complete documents submitted, unit is deemed compliant. However, when lease term has ended for a previously compliant submittal the entire row is shown in dark red but will still say “accept” and, therefore, it is considered as expired.

To view the tenant’s history, click on the “status” field. A new screen will open showing the submission history. This includes when and by whom the tenant information was entered into the Portal, as well as when it was reviewed.

If a non-compliance determination was made, the reason for the decline will also be displayed in the comment’s column.

Name	Status	Comments	Date Changes	Changed
Tenant 11	Draft	Tenant entered -	1/13/2026 3:43:02 PM	istafeyc
Tenant 11	Submitted	Tenant submitted -	1/13/2026 3:43:16 PM	istafeyc
Tenant 11	Not accepted	Tenant not accepted - The Total Household Income of \$58000 is below the 2024 income schedule in effect. Required actions: Please find a different unit/tenant to meet the WHP obligation. If income is too low, offer them the option to lease it at a rent below the WHP bottom income range.	1/13/2026 3:43:51 PM	istafeyc

Close

Tenant Overlap

As noted above, when you are adding a new tenant, be sure to toggle the “expire leases” button to check if the unit is currently showing up in the portal as occupied. If the previous tenant moved out prior to their lease end date, **you are required to notify WHP staff immediately** with the actual move-out date to adjust their lease end date in the portal. A note will be added to the tenant’s profile that they moved out prior to their lease end date and the new tenant can be entered.

You can proceed with entry of the new tenant; however, as shown below, the portal will show as an overlapping tenant, and WHP staff would not be able to complete compliance determination until the prior tenants’ move out date is adjusted.

If the previous tenant is still occupying the unit for the remainder of their lease, the new tenant cannot be placed into this unit.

Update Tenant

Bldg #: 12

Lease Holder Name:* Testing

Leasing Start Date:* 7/1/2025

Lease period is overlapping with an existing lease

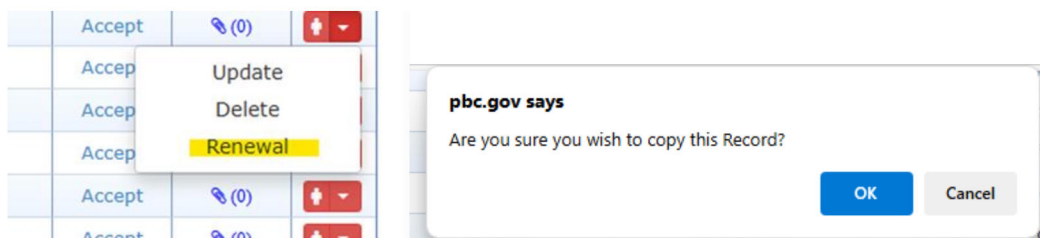
Renewing a Tenant

Property Managers have the option to renew tenants based on the prior lease addendum and income category certification, or to recertify the tenant's income at renewal. Both processes are addressed below.

By default, the entry screen for renewals is set to open as renewal without re-certification, and income, income category and income certification dates are inactive. Ensure the tenant type is set to “**renewal without re-certification**”. If you are renewing with recertification, see the section after the one below “Option 2”.

Option 1: Renewal with NO RECERTIFICATION (Based on Original Lease Addendum and Original Income Category Determination)

- Before entering the renewing tenant's information, the Property Manager should locate the tenant's original lease addendum and use it to fill out the WHP Rental Calculation Worksheet, per the instructions in Part I of this manual. A digital copy/scan of **this document should be saved using the naming conventions in Part I of this manual**, and should be ready to be attached during this process. Also save these documents in your files for your records.
- **No new lease addendum is required if the tenant's income will not be recertified.**
- Check if renewal date is today's date or later, then search in tenants list for the current lease information. If it is already passed the lease renewal date move toggle button to show “expired leases” in red to view list of current and expired leases. *(Tips: lease end date should be close to new lease start date or in red as an expired lease. Can also sort by the unit number or use “Ctrl-F” and type last name or unit number.)*
- From the dashboard, find the correct tenant and unit number that is renewing their lease. Click on the red person action tool, click renewal, and press okay to copy the file.



- The renewal screen will create a copy of prior lease information, but with lease start and end dates being blank. The rest of the information is copied from the prior entry: Income certification information (income, income certification date and income category), base rent, mandatory fees, Max WHP rent etc.
- In the renewal screen fill out new lease dates and update the following fields (highlighted in yellow) using information from the WHP Rent Calculation Worksheet. The Max WHP rent field is an active field, however it is not a mandatory field. You could enter the Max WHP rent based on the income category and unit size and schedule in effect at time of lease execution or leave it “0” and Staff will review and/or enter correct Max WHP rent during compliance review.

- Once the screen is filled out and the documents are attached, review the information to check if it matches the physical documents, that the tenant is placed in the correct income category, and that they are not being overcharged based on the max WHP rent schedule.
- When you are finished, **press submit**. If you press the “save” button it will be in your drafts and will not be visible to WHP staff.

Bldg #: 1 Unit #: 200 No of Bedroom(s): 2

Lease Holder Name: Name

Leasing Start Date: 10/01/2025 Leasing End Date: 9/31/2026 WHP Certification Date: 10/1/2024

Household Income: \$ 85000 Income Category: > 60-80% of MFI

Monthly Rent: \$ 1800

Mandatory Fees

Trash: \$ 20 Fee 2: \$ 2 Fee 3: \$ 0 Fee 4: \$ 0

Total Monthly Rent: \$ 1822

Applicable Utility allowance: \$ 50 \$ 1772 WHP rent per worksheet

Additional Concession/Discount: \$

Max WHP Rent per the applicable WHP rent schedule: \$ 2104 WHP Schedule

Required Utility allowance: \$ 50 \$ 2054 Max WHP Rent in effect reduced by Applicable Utility Allowance

Tenant Type: New tenant: ☐ Renewing tenant WITHOUT re-certification: ☒ Renewing tenant with re-certification: ☐ Other event: ☐

Overcharge: 0

Document to upload: View/Add Documents (1 Attachments)

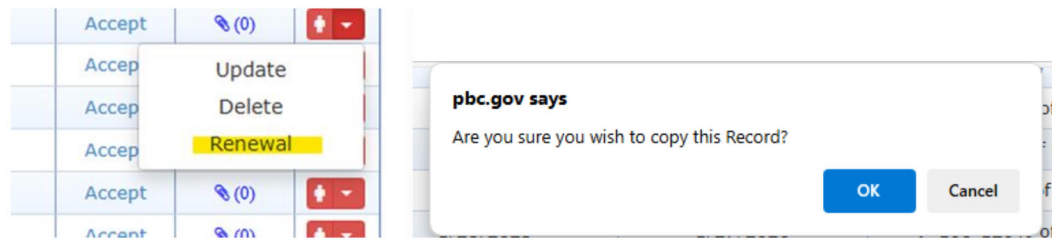
Save Submit Close

Option 2: Renewing a Tenant with RECERTIFICATION

The Property Manager has the option to recertify WHP tenants at lease renewal. To do so, the Property Manager must provide the tenant with a notice of the intent to recertify **60 days prior** to the end of the current lease. (The Property Manager may also recertify the tenant mid-lease at the tenant’s request, to address situations such as a reduction in household size or income. The decision to do so is at the Property Manager’s discretion.)

- Before entering the tenant information, you should have already filled out both the new Lease Addendum and new WHP Rental Calculation Worksheet with the instructions in Part I of this manual, signed, dated, and every line filled out. A digital copy/scan of **these documents should be saved using the naming conventions outlined in Part I of this manual**, and should be ready to be attached during this step. You should also save these documents in your own files for your records.
- Check if renewal date is today’s date or later then search in tenants list for the current lease information. If it is already passed the lease renewal date move toggle button to show “expired leases” in red to view list of current and expired leases.
- Find the prior entry for the tenant (*Tips: lease end date should be close to new lease start date or in red as an expired lease. Can also sort by the unit number or use “Ctrl-F” and type last name or unit number.*)

- From the dashboard, find the correct tenant and unit number that is renewing their lease. Click on the red person action tool, click renewal, and press okay to copy the file.



- The renewal screen will display some information from the tenant's prior lease.
- Click on the radio button under tenant type for **“renewing with re-certification”** on the screen. You will need to update new income, income category, income certification date and the rest of fields: lease term, base rent and fees, applicable utility allowance and Max WHP rent (highlighted in yellow), using information from the new WHP Rent Calculation Worksheet and Lease Addendum. The Max WHP rent field is an active field, however it is not a mandatory field. You could enter the Max WHP rent based on the income category and unit size and schedule in effect at time of lease execution or leave it “0” and Staff will review and/or enter correct Max WHP rent during compliance review.
- Once the screen is filled out and the documents are attached, verify that the information entered matches the physical documents, the correct income category has been selected, and that the tenant is not being overcharged based on the max WHP rent schedule.
- Once completed and verified, **press submit**. If you press the “save” button it will be in your drafts and will not show on our end.

Bldg #:	1	Unit #:	200	No of Bedroom(s):	2
Lease Holder Name:	Name				
Leasing Start Date:	10/01/2025	Leasing End Date:	9/31/2026	WHP Certification Date:	10/01/2025
Household Income:	\$ 85000	Income Category:	> 60-80% of MFI		
Monthly Rent:	\$ 1900				

Mandatory Fees

Trash:	\$ 20	Fee 2:	\$ 2	Fee 3:	\$ 0	Fee 4:	\$ 0
--------	-------	--------	------	--------	------	--------	------

Total Monthly Rent:	\$ 1922	
Applicable Utility allowance:	\$ 50	\$ 1872 WHP rent per worksheet
Additional Concession/Discount:	\$	

Max WHP Rent per the applicable WHP rent schedule:	\$ 2104	WHP Schedule
Required Utility allowance:	\$ 50	\$ 2054 Max WHP Rent in effect reduced by Applicable Utility Allowance

Tenant Type: New tenant: ☐ Overcharge: 0 Document to upload: [View/Add Documents](#) (1 Attachments)

Renewing tenant WITHOUT re-certification: ☐

Renewing tenant with re-certification: ☒

Other event: ☐

Save Submit Close

Viewing and Downloading List of Current Tenants

The Portal allows you to see the status of all WHP tenants at a glance. You can toggle the button at the top to see expired leases that will show up in red. You can see the status of the tenant on the right as well as view their documents by clicking on the blue paperclip, etc.

Tenants Data Entry

Tenants Search: Project Name: Sample project 1 Expired Lease

Summary for July:
 Total Occupied: 8 Vacant units: 4 Occupancy Rate: 66.67%
 Required Units: Low: 3; Moderate 1: 3; Middle: 3
 Occupied Units: Low: 5; Moderate 2: 1; Middle: 0

[Export list of tenants](#)

Tenant ID	Unit #	Tenant Name	Bedrooms	Leasing Start Date	Leasing End Date	Income Category	WHP Cert. Date	Income at Cert. Date	Status	Document	Action
1850	203B	Tenant 4	1	05/01/2025	05/30/2026	> 80-100% of MFI	02/15/2022	65500	Not accepted	% (0)	+
83	101B	Tenant 11	2	07/15/2025	07/24/2026	> 80-100% of MFI	05/10/2023	83200	Submitted	% (0)	+
1852	207B	Tenant 2	2	05/01/2025	06/30/2026	> 60-80% of MFI	04/24/2025	69950	Accept	% (2)	+
1851	301A	Tenant 12	2	05/01/2025	06/30/2026	> 60-80% of MFI	04/24/2025	65220	Accept	% (2)	+
90	209B	Tenant 6	2	01/21/2025	01/31/2026	> 60-80% of MFI	01/29/2025	69420	Accept	% (0)	+
89	102B	Tenant 5	2	08/29/2024	10/31/2025	> 100-120% of MFI	06/29/2023	95560	Accept	% (0)	+
88	308B	Tenant 10	2	07/12/2024	09/30/2025	> 80-100% of MFI	05/12/2023	89352	Accept	% (0)	+
87	303B	Tenant 7	1	06/14/2024	06/30/2025	> 60-80% of MFI	06/14/2024	73824	Accept	% (0)	+
86	303A	Tenant 8	1	06/04/2024	08/31/2025	> 80-100% of MFI	02/04/2022	66000	Accept	% (0)	+
85	208A	Tenant 9	1	05/05/2024	07/31/2025	> 60-80% of MFI	01/05/2022	50000	Accept	% (0)	+
84	203B	Tenant 4	1	06/15/2024	04/30/2025	> 80-100% of MFI	02/15/2022	65500	Accept	% (0)	+
82	203A	Tenant 3	1	07/01/2024	08/31/2025	> 60-80% of MFI	05/01/2023	68880	Accept	% (0)	+
81	107B	Tenant 5	2	04/14/2024	04/30/2025	> 80-100% of MFI	03/05/2024	72240	Accept	% (0)	+
80	105A	Tenant 1	1	12/29/2023	02/28/2025	> 80-100% of MFI	02/02/2024	80898	Accept	% (0)	+

Displaying Items 1 - 14 of 14

[Add Tenant](#) [Occupancy Report](#) [Reset Sorting](#)

- Click on **“export list of tenants”** to download the Excel spreadsheet with tenant data. Open the Excel Workbook from your downloads folder. This portal feature is for your staff to view the unit number, name, lease dates, income category, status, and so forth for each tenant in one place. You may organize and edit this workbook as it is for your internal records/tracking using the Excel features as you wish. (*Tip: use the sort & filter tool in Excel to organize and find data*).

Project Name	WHP Rental Unit Number	Number of Bedrooms	Leaseholder Name	LEASING START DATE	LEASING END DATE	WHP Certification Date	Total Household Income at WHP certification on date	WHP Income Category at certification on date	Monthly Rent	Trash	FEE2	FEE3	FEE4	Concessions	Total Monthly Rent	Max WHP Rent	Applicable Utility allowance	Required Utility allowance	Max WHP Rent in effect reduced by Applicable Utility Allowance	WHP rent per worksheet	Overcharge	Status
Sample pr 203B			1 Tenant 4	5/1/2025	5/30/2026	2/15/2022	65500	> 80-100%	1778						1778	1607	0		1607	1778	171	Declined
Sample pr 101B			2 Tenant 11	7/15/2025	7/24/2026	5/10/2023	83200	> 80-100%	2143						2143	2193	0	50	2143	2143	0	Pending Review
Sample pr 207B			2 Tenant 2	5/1/2025	6/30/2026	4/24/2025	69950	> 60-80%	1556	0	0	0	0	0	1556	1928			1928	1556	0	Current
Sample pr 301A			2 Tenant 12	5/1/2025	6/30/2026	4/24/2025	65220	> 60-80%	1490	0	0	0	0	0	1490	1928			1928	1490	0	Current
Sample pr 209B			2 Tenant 6	1/21/2025	1/31/2026	1/29/2025	69420	> 60-80%	1740						1740	1928			1928	1740	0	Current
Sample pr 102B			2 Tenant 5	8/29/2024	10/31/2025	6/29/2023	95560	> 100-120%	2362						2362	2892	0	0	2892	2362	0	Current
Sample pr 308B			2 Tenant 10	7/12/2024	9/30/2025	5/12/2023	89352	> 80-100%	2075						2075	2410	0	0	2410	2075	0	Current
Sample pr 303A			1 Tenant 8	6/4/2024	8/31/2025	2/4/2022	66000	> 80-100%	1700						1700	1828	0	50	1778	1700	0	Current
Sample pr 208A			1 Tenant 9	5/5/2024	7/31/2025	1/5/2022	50000	> 60-80%	1412						1412	1462	0	50	1412	1412	0	Current
Sample pr 203A			1 Tenant 3	7/1/2024	8/31/2025	5/1/2023	68880	> 60-80%	1395						1395	1607	0	50	1557	1395	0	Current

The unit status is shown in the “status” column:

- Current:** submittal for this tenant is compliant, and the lease is active as of the report date
- Pending Review:** the submittal has been received and is under review
- Declined:** the submittal was not accepted, and a notification was provided with reasons
- Expired:** lease term has ended for a previously compliant submittal as of report date

Viewing and Downloading List of Current and Past Tenants

If you want to include past or expired tenants in the export list, you can toggle on the expired leases button. It will show the past tenants in red. And then you can go ahead and do the same process by clicking on the export list of tenants. Notice that the status for expired leases still shows as “accepted”.

Occupancy Tracking- Summary Snapshot

The Restrictive Covenant for your project requires a specific number of WHP units, with those to be distributed among certain income categories.

On the top of your dashboard screen, you have a snapshot occupancy summary in blue, showing the number of compliant units to date:

- Total number of occupied units
- Number of vacant units
- Occupancy: total number of occupied units/numbers of required WHP units
- Required units: number of units required in each income category per Restrictive Covenant
- Number of occupied units in each income category

Summary for July:

Total Occupied: 8 Vacant units: 4 Occupancy Rate: 66.67%
Required Units: Low: 3; Moderate 1: 3; Moderate 2: 3; Middle: 3
Occupied Units: Low: 5; Moderate 1: 2; Moderate 2: 1; Middle: 0

Monthly Occupancy Compliance Check

- Each project requires 90% occupancy.
- If occupied units fall below 90% for more than 30 days, you will receive a code compliance notification. Verify that you have entered any new tenants or renewals.
- If occupied units fall below 90% for more than 60 days, the non-compliance issue will be forwarded to the Code Compliance Division for enforcement.
- To view your occupancy, click on occupancy report at the bottom of your dashboard.

Tenants Data Entry									
Tenants Search									
Project Name:		Summary for July:							
Sample project 1		Total Occupied: 8 Vacant units: 4 Occupancy Rate: 66.67%							
		Required Units: Low: 3; Moderate 1: 3; Moderate 2: 3; Middle: 3							
		Occupied Units: Low: 5; Moderate 1: 2; Moderate 2: 1; Middle: 0							
Tenant ID	Unit #	Tenant Name	Bedrooms	Leasing Start Date	Leasing End Date	Income Category	WHP Cert. Date	Income at Cert. Date	Export list of tenants
1850	203B	Tenant 4	1	05/01/2025	05/30/2026	> 80-100% of MFI	02/15/2022	65500	Not accepted
83	101B	Tenant 11	2	05/10/2024	07/31/2025	> 80-100% of MFI	05/10/2023	83200	Submitted
1852	207B	Tenant 2	2	05/01/2025	06/30/2026	> 60-80% of MFI	04/24/2025	69950	Accept
1851	301A	Tenant 12	2	05/01/2025	06/30/2026	> 60-80% of MFI	04/24/2025	65220	Accept
90	209B	Tenant 6	2	01/21/2025	01/31/2026	> 60-80% of MFI	01/29/2025	69420	Accept
89	102B	Tenant 5	2	08/29/2024	10/31/2025	> 100-120% of MFI	06/29/2023	95560	Accept
86	308B	Tenant 10	2	07/12/2024	09/30/2025	> 80-100% of MFI	05/12/2023	89352	Accept
86	303A	Tenant 8	1	06/04/2024	08/31/2025	> 80-100% of MFI	02/04/2022	66000	Accept
85	208A	Tenant 9	1	05/05/2024	07/31/2025	> 60-80% of MFI	01/05/2022	50000	Accept
82	203A	Tenant 3	1	07/01/2024	08/31/2025	> 60-80% of MFI	05/01/2023	68880	Accept
Displaying items 1 - 10 of 10									
Add Tenant Occupancy Report Reset Sorting									

- Open your occupancy report from your downloads folder. This will generate a summary of your property data and occupancy rate. Property managers should use this tool to keep track of the WHP units and ensure the community does not fall below 90% occupancy.
- Below is an example of a community that has been below the required 90% for several months. This project has not provided documentation on renewals and new tenants, nor has it responded to multiple follow-up requests from WHP staff requests for information. As a result, this project would be referred to Code Compliance.

Project Name	Sample project 1		25-Jan	25-Feb	25-Mar	25-Apr	25-May	25-Jun	25-Jul	25-Aug	25-Sep	25-Oct	25-Nov
Total occupied			10	10	9	9	9	9	9	8	6	5	4
Total Unit	12	WHP units	12	12	12	12	12	12	12	12	12	12	12
Occupancy rate			83%	83%	75%	75%	75%	75%	75%	67%	50%	42%	33%
Low	3		4	4	4	4	6	6	5	4	3	3	3
Moderate	3		5	5	4	4	2	2	2	2	1		
Moderate	3		1	1	1	1	1	1	1	1	1	1	
WHP Unit:	12		10	10	9	9	9	9	8	7	5	4	3
Vacant			2	2	3	3	3	3	4	5	7	8	9

- This is also a useful tool to assess the projected occupancy rate for future months, which is based on the current tenants' lease start and end dates. The declining occupancy percentages reflects that leases will be ending and that documentation for new or renewing tenants has not yet been submitted. The required 90% occupancy looks *backwards* over the latest 60 days, so projected future low occupancy is not a compliance issue, but is a useful tool for Property Managers.

Project Name	Sample project 1		25-Jan	25-Feb	25-Mar	25-Apr	25-May	25-Jun	25-Jul	25-Aug	25-Sep	25-Oct	25-Nov
Total occupied			10	10	9	9	9	9	9	8	6	5	4
Total Unit	12	WHP units	12	12	12	12	12	12	12	12	12	12	12
Occupancy rate			83%	83%	75%	75%	75%	75%	75%	67%	50%	42%	33%
Low	3		4	4	4	4	6	6	5	4	3	3	3
Moderate	3		5	5	4	4	2	2	2	2	1		
Moderate	3		1	1	1	1	1	1	1	1	1	1	
WHP Unit:	12		10	10	9	9	9	9	8	7	5	4	3
Vacant			2	2	3	3	3	3	4	5	7	8	9

(Tip: Check this report monthly and check your occupancy percentages after move out and move ins are occurring. This report tool and spreadsheet should remind you to send or upload any new or renewing tenants. This helps keep the portal up to date and keep you from becoming noncompliant/referred to Code Compliance.)

Automated Email Notifications:

Each submission will generate an automated notification email (on behalf of WHP staff) to project managers. WHP Staff will also receive the same email. Automatic notification emails from the Portal will be sent to the property management staff email who entered the tenant into the system.

There are **three types of automated notifications**:

- Notice of Submittal.** This notification serves as a record for both you and WHP staff that the submittal has been made.

Required action: No further action is required.



Palm Beach County Housing Dashboard Application

Your information was submitted and County will provide Compliance determination within 3 days.

Project Name: Sample Project 1

Unit #: 301

Tenant name: Tenant 6

Lease dates: 07/29/25 - 07/28/26

This is an auto-generated email by the Housing Dashboard Application.

2. **Notice of compliance determination.**

- If unit is compliant the notice will state “Application was accepted”.

Required action: Provide copies of the WHP Lease Addendum and WHP Rent Calculation Worksheet to the tenant(s) within 3 days of the compliance determination.

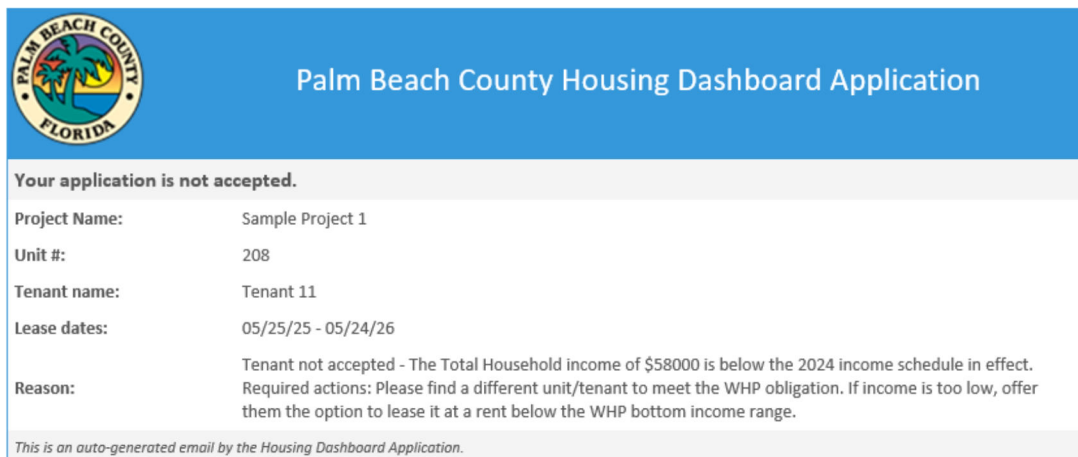


The image shows a screenshot of an email notification from Palm Beach County Housing. The header is blue with the Palm Beach County Florida seal on the left and the title "Palm Beach County Housing Dashboard Application" on the right. The main body is white with a grey header bar that says "Thank you for your submission! This unit is compliant. Please provide copies of the Lease Addendum and/or WHP Rent Calculation Worksheet to the tenant(s) within 3 days of compliance determination." Below this is a table with the following information: Project Name: Sample Project 1, Unit #: 301, Tenant name: Tenant 6, Lease dates: 07/29/25 - 07/28/26, Reason: Tenant Accepted -. At the bottom, it says "This is an auto-generated email by the Housing Dashboard Application."

Palm Beach County Housing Dashboard Application	
Thank you for your submission! This unit is compliant. Please provide copies of the Lease Addendum and/or WHP Rent Calculation Worksheet to the tenant(s) within 3 days of compliance determination.	
Project Name:	Sample Project 1
Unit #:	301
Tenant name:	Tenant 6
Lease dates:	07/29/25 - 07/28/26
Reason:	Tenant Accepted -
This is an auto-generated email by the Housing Dashboard Application.	

- If unit is non-compliant the notice will state “Application was not accepted”.

Required actions: Review the reason for non-compliance listed at the bottom of the notice. Follow any instructions provided to address the issue.



The image shows a screenshot of an email notification from Palm Beach County Housing. The header is blue with the Palm Beach County Florida seal on the left and the title "Palm Beach County Housing Dashboard Application" on the right. The main body is white with a grey header bar that says "Your application is not accepted." Below this is a table with the following information: Project Name: Sample Project 1, Unit #: 208, Tenant name: Tenant 11, Lease dates: 05/25/25 - 05/24/26, Reason: Tenant not accepted - The Total Household income of \$58000 is below the 2024 income schedule in effect. Required actions: Please find a different unit/tenant to meet the WHP obligation. If income is too low, offer them the option to lease it at a rent below the WHP bottom income range. At the bottom, it says "This is an auto-generated email by the Housing Dashboard Application."

Palm Beach County Housing Dashboard Application	
Your application is not accepted.	
Project Name:	Sample Project 1
Unit #:	208
Tenant name:	Tenant 11
Lease dates:	05/25/25 - 05/24/26
Reason:	Tenant not accepted - The Total Household income of \$58000 is below the 2024 income schedule in effect. Required actions: Please find a different unit/tenant to meet the WHP obligation. If income is too low, offer them the option to lease it at a rent below the WHP bottom income range.
This is an auto-generated email by the Housing Dashboard Application.	

3. **90-day lease expiration notice.** This is a courtesy notification that WHP leases are expiring in 90 days, reminding the Property Manager to review the status of each unit and determine whether to proceed with a lease renewal or a tenant replacement. There are several possible scenarios:

- Tenant(s) are not renewing.** In this case, the unit must be rented to a new WHP tenant(s), or an alternate WHP unit must be provided to meet the WHP obligation.
- Tenant(s) renew the lease.** If the tenant(s) renew, please enter the renewal information into the Portal. Note that if the renewing tenant is to be income-recertified, the WHP requires notice to the tenant no less than 60 days prior to renewal.
- Tenant(s) have already moved out.** Please provide WHP staff with the move-out date and enter the information in the portal for the required replacement WHP tenant or an alternate WHP unit.

Frequently Asked Questions

Q: The tenant has moved out — Why is their lease still showing in the Portal?

A: All prior records are retained in the Portal for future reference, inquiries, and records retention purposes.

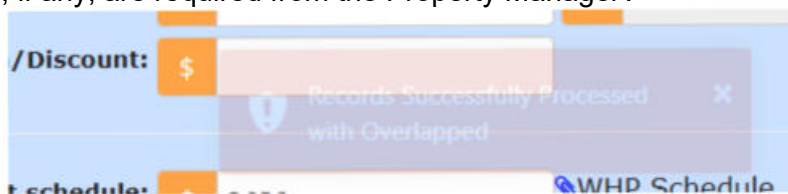
Q: The tenant has moved out before the lease end date. What do we need to do?

A: Please notify WHP staff immediately. Please also ensure that the unit is rented to WHP tenant(s), or an alternate WHP unit is provided and submitted through the portal to continue to meet the WHP obligation.

Q: Why I am not receiving 90 days of expiration automated messages from the Portal?

A: Notices are sent only to the Property Manager who originally entered the WHP tenant into the Portal. If there is a change in staffing please immediately notify WHP staff and we will forward such notifications manually to new Property Manager.

Q: When entering new tenant and/or renewal information, a red message appears stating “**Records Successfully Processed with Overlap**” (see below). What does this message mean, and what actions, if any, are required from the Property Manager?



A: This message indicates that the dates of the prior lease and the new lease overlap. The Property Manager must verify whether the prior lease expiration date was entered incorrectly or whether the prior tenant(s) have already moved out. For guidance on **new tenants** and **renewal tenant** scenarios, please refer to the explanations below:

New Tenant Case: There was a prior tenant in this unit, and the prior tenant has moved out.

- If you see this message, sort the tenant list (including expired leases) by **unit number** and review the prior tenant’s information for this unit.
- If the prior tenant has indeed moved out prior to the end of the lease term, or if the prior tenant’s lease expiration date was entered incorrectly, **notify WHP staff immediately** with the actual move-out date. (portal entry?)
- If the issue is due to a **typo** in the unit number or lease dates for the new tenant, open the new tenant’s record and **correct the inaccurate information**.

Renewing Tenant Case:

- Sort units (including expired leases) by unit number.
- Open the prior lease entry and compare lease dates with the attached Lease Addendum and/or WHP Rent Calculation Worksheet to verify if dates were entered correctly.
- If there is an issue with the dates entered for the prior lease, notify WHP staff.
- If the renewal lease dates were entered incorrectly, open submitted renewal entry and correct the dates.

Contact Information

The Palm Beach County Workforce Housing Team offers quarterly group training as well as individual portal training meetings through Zoom or Microsoft Teams, upon request. For new developments or newly hired Project Managers, please contact WHP staff for WHP portal training or to receive a digital copy of this manual.

The Workforce Housing Portal will be **mandatory** for tenant submittals effective **February 1st, 2026**. Tenant submissions sent via email to PZB-WHPRentals@pbc.gov will no longer be accepted thereafter.

For any questions or issues, please contact WHP staff at PZB-WHPRentals@pbc.gov or call the Palm Beach County Planning Division at (561) 233-5300. You can also visit our county website at <https://discover.pbcgov.org/pzb/planning/Projects-Programs/WorkforceHousingProgram.aspx>.

For any emails sent to PZB-WHPRentals@pbc.gov, please include the community's name in the subject line and in the body of the email please identify the specific issue, unit, and tenant name.

Under Florida law, e-mail addresses are public records. If you do not want your e-mail address released in response to a public records request, do not send electronic mail to this entity. Instead, contact this office by phone.



Palm Beach County Planning Division

Workforce Housing Program

2300 N Jog Rd, West Palm Beach, FL 33411

(561) 233-5300

<https://discover.pbcgov.org/pzb/planning/Pages/default.aspx>



Click to follow [PBC](#) and [PZBPBC](#)