Procorem Training Presentation

December 10, 2025

Maryland
DEPARTMENT OF HOUSING
AND COMMUNITY DEVELOPMENT
Jacob R. Day, Secretary
Julia Glanz, Deputy Secretary

dhcd.maryland.gov

HOUSEKEEPING

✓ Mute Yourself When Not Speaking

✓ Feel free to type your questions in the Q&A box before the Q&A Session. Otherwise, questions will be answered during the Q&A Session.

AGENDA

1. Introduction to Procorem

2. Procorem Onboarding: Invitation & Account Creation
   - Creating Your Procorem Account
   - Accessing Procorem
   - Updating Your Profile

3. Navigating Features in Procorem

4. Introduction to WorkCenters

5. WorkCenter Collaborators

6. Uploading Documents to Procorem

7. Procorem Resources & Support

8. What's Next

9. FAQs

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Introduction to Procorem

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## INTRODUCTION TO PROCOREM – Learning Objectives

You will learn…

➢ What Procorem is and how it can streamline your processes

➢ Procorem Structure and Terminology

INTRODUCTION TO PROCOREM

Beginning January 2026, The Maryland Department of Housing and Community Development (MDDHCD) is launching **Procorem** to communicate and collaborate with the Division of Credit Assurance (DCA) and the Community Development Administration (CDA).

WHAT IS PROCOREM?

Procorem is **a secure portal**, compatible with your tablets and cell phones, **designed to streamline document management**, task assignments, and communications between MDDHCD and its internal and external business partners.


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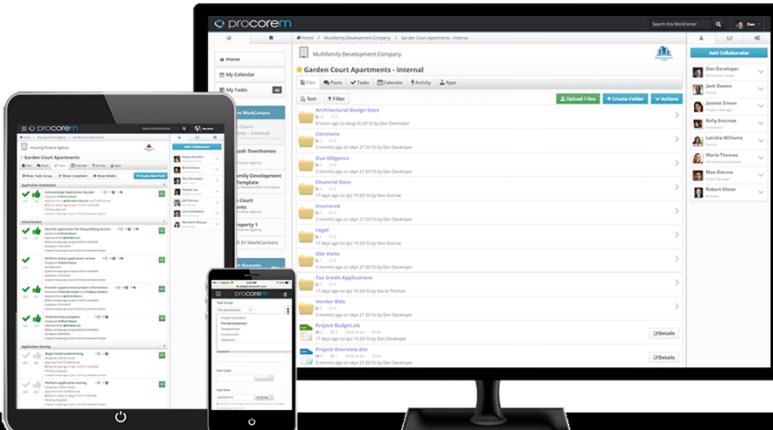
INTRODUCTION TO PROCOREM **– Procorem Structurer**

All users will be assigned to 1 Procorem account. Once your account is established, a DCA Procorem Administrator can add you to multiple project WorkCenters as needed.

Within each WorkCenter, users can collaborate with individuals within their WorkCenters by:

- 📋 **Creating/Assigning Tasks**

- 📄 **Uploading Files**

- 💬 **Creating Posts**

- 📅 **Tracking Tasks in their Calendars**

- ∿ **Viewing WorkCenter Activity**

INTRODUCTION TO PROCOREM – Terminology

Term	Definition
Account	An account is the **top level in Procorem and is typically used to represent an organization or department within your organization.** In your account, you are a member of Procorem who can, upload and store documents, create task deadlines, and more.
WorkCenters	WorkCenters roll up directly to accounts. For every account, you can have an unlimited number of WorkCenters. **Think of WorkCenters as a secure, online space which allows users to store, share and collaborate on work.** WorkCenters typically represent a project, team, or property. Within WorkCenters, you can upload documents, assign tasks, comment, and create posts as well as monitor activity across the WorkCenter.
Files & Folders	Easily store, share, and collaborate on any type of files with Procorem.
Posts	Maintain a complete history of your project communications by using comments within Procorem. **Comment on the WorkCenter, document, or task to collaborate with your team.** Comments are searchable, embedded in the WorkCenter, and remain archived in Procorem during and after the life of the project.

INTRODUCTION TO PROCOREM – Terminology (cont.)

Term	Definition
Tasks	**Assign tasks to users within the WorkCenter, sort and filter your tasks for easy project management**, and create task priorities for more detailed projects. Task functionality ensures your team stays on track.
Calendar	Quickly visualize your project with comprehensive calendar functionality. Easily **monitor task progress and keep your team on track** with important events.
Activity	Procorem's activity feed **keeps an auditable history of all events and interactions that take place within the system.** Instantly updated as activity takes place, the Activity feed allows you to keep a close eye on project progress. See which files or conversations are trending and which team members are engaged

Procorem Onboarding

Invitation & Account Creation

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PROCOREM ONBOARDING - Invitation & Account Creation

You will learn how to…

➢ Create Your Procorem Account

➢ Access Procorem

➢ Update Your Profile

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PROCOREM ONBOARDING - Creating Your Procorem Account

When you are first invited to join a WorkCenter in Procorem, **you will receive an email invitation** prompting you to create your account. Once you've received the email invitation, Select the blue **Sign Up** button

Once your account is established, the Procorem Administrator can add you to additional project WorkCenters as needed.

Be sure to check your Spam and Junk folders, if you do not receive an email notification by January 30, 2026.

Hi Renee Just-Buddy,

You've been invited to collaborate on a new Account in Procorem by **Renee Just-Buddy**, the one place to easily invite, collaborate, plan, and share information!

Please join my private and secure DCA TEST WORKCENTER WorkCenter.

Renee Just-Buddy
Maryland Department of Housing and Community Development

Sign Up

Thanks for choosing Procorem to collaborate and stay productive.

Let's get to work!
All of us on the Procorem team

Read our blog | Got questions? | Connect!

Procorem | 98 Inverness Drive East, Suite 250, Englewood, CO 80112

Replying to this email may create a post in Procorem, or your reply could be sent to an inbox that is not monitored. You are receiving this email because you signed up to receive notifications or were invited to

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PROCOREM ONBOARDING - Creating Your Procorem Account

After signing up for an account, you will receive an email asking you to **Confirm Account and Get Started.**

procorem

Let's Get Started!

Welcome! We're glad you decided to join Procorem, the place to easily orchestrate your life and your work.

Getting started is simple!

1. Confirm your account.
2. Customize your profile.
3. Create and explore your WorkCenters.

Confirm Account and Get Started!

Thanks for choosing Procorem to collaborate and stay productive.

Let's get to work!
All of us on the Procorem team
Read our blog | Got questions?

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PROCOREM ONBOARDING - Creating Your Procorem Account (cont.)

After Signing up for your Procorem account, you will receive an email inviting you to create your Procorem account.

> ➤ Your First Name, Last Name, and Email Address will be auto populated in the corresponding boxes.
>
> ➤ Create a Password that meets the password criteria
>
> ➤ After reading the Terms and Conditions, select the box to agree to them.
>
> ➤ Select **Sign Up Now**

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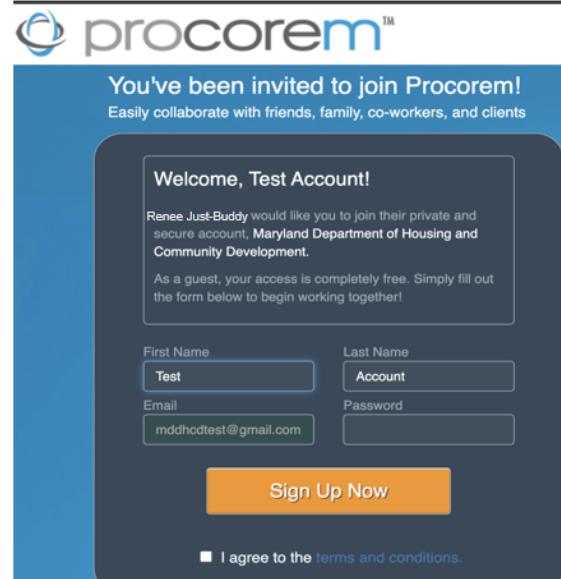
PROCOREM ONBOARDING - Accessing Procorem

1

Use One of the Supported Web Browsers
- ✓ Google Chrome - Recommended
- Mozilla Firefox
- Apple Safari
- Microsoft Edge

2

Enter Your:
- Email Address
- Password

Use the Forgot Password link to request a new password
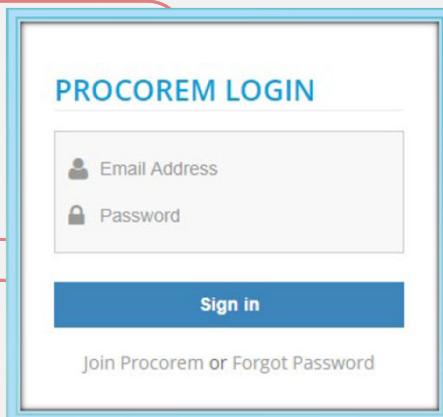
PROCOREM LOGIN

👤 Email Address

🔒 Password

Sign in

Join Procorem or Forgot Password

3

You will land on your Home screen – **My Activity Feed**

◆ procorem

☰ Home

My Activity Feed

My Calendar

My Tasks   1

My Accounts   1

My Favorites   0

◷ Recent

Maryland Department of Housing and Community Development

My Activity Feed

◇ procorem
OUR QUARTERLY TRAINING HAS CONCLUDED!
Please click the button if you would like to be added to the mailing list for future trainings.

GET NOTIFIED

Activity Feed   Pending Items (0)

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PROCOREM ONBOARDING - Updating Your Profile

Follow the steps below to update your Procorem profile

1 From the **My Activity Feed** screen:
- Select the dropdown arrow, next to the person icon in the upper right corner of the screen
- Select **Profile**
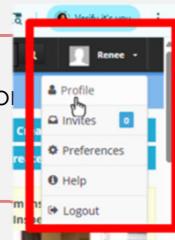
2
- Complete all the fields on the screen
- Select **Save Changes**

3 To return to your Home screen, select **Procorem** in the at the top of your screen

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Additional Features on Your Profile Page

- **Picture** - Add a profile picture
- **Invites** – See a list of WorkCenters that you have been invited to
- **Security** - Change/Update your password

- **Preferences** - update your email preferences to:
  - o Receive email notifications
  - o Turn off email notifications
  - o Select how often you would like to receive email digests, if you opt-in to do so.
- *Background Processes is information managed by the ProLink/Procorem Administrator*

Navigating Features

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NAVIGATING FEATURES - My Activity Feed
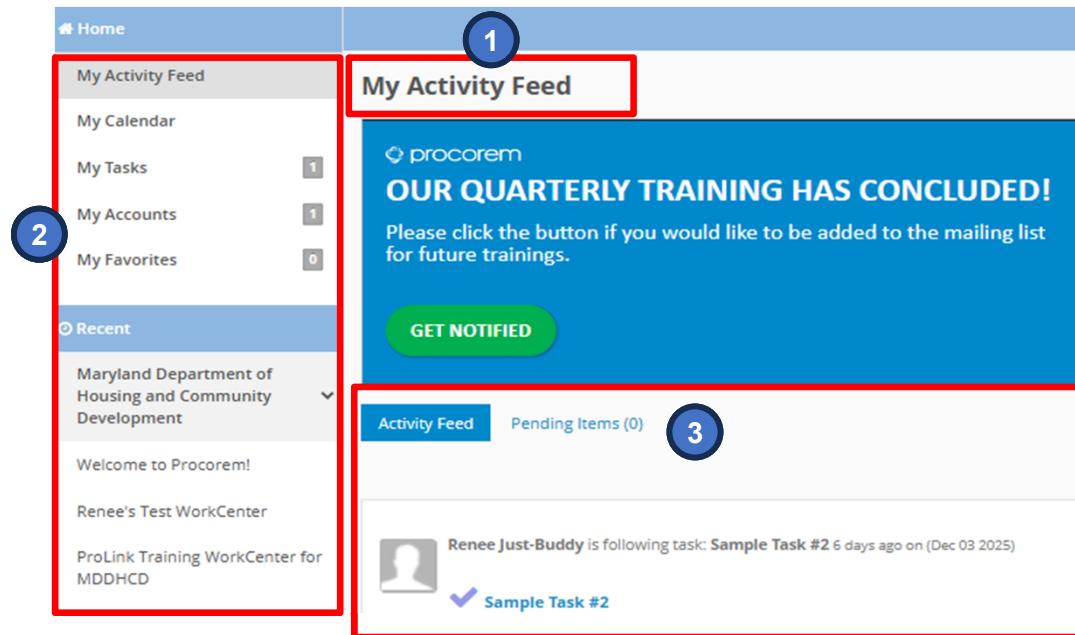
1 Once logged into Procorem, you will land on your **Home Screen – My Activity Feed screen**

2 The **Left Navigation Menu** offers links to your most recently visited WorkCenters, and other features within Procorem.

3 Your **Activity Feed** displays all activity that has been completed in your WorkCenters such as:

- Users being added to or removed from WorkCenters.
- Uploaded/Downloaded Files
- Posts and tasks that have been created and their status

NAVIGATING FEATURES - My Calendar

My Calendar allows you to quickly see due dates for any assigned tasks and monitor their progress, in an easy to read calendar view.

NAVIGATING FEATURES - My Tasks, Accounts & Favorites
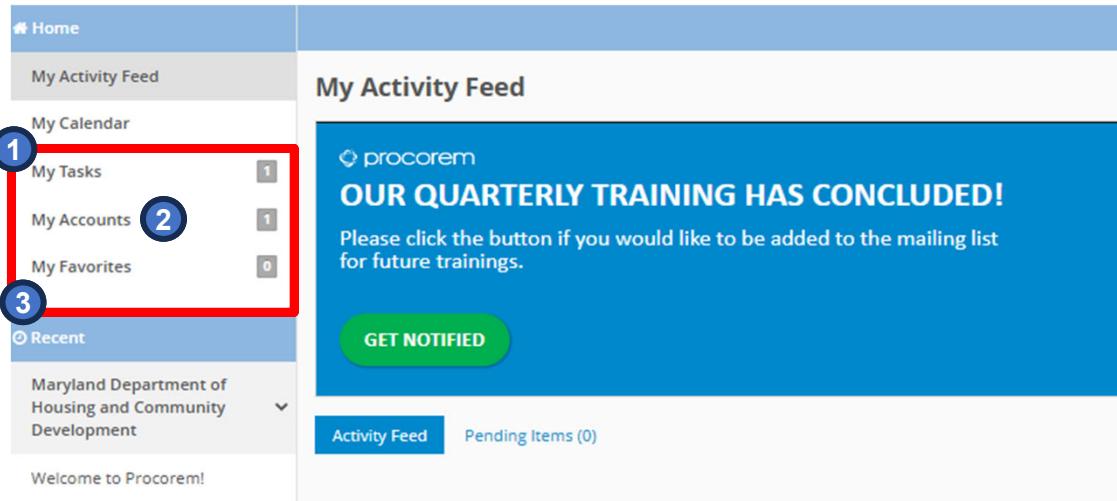
1 **My Tasks** displays any tasks assigned to you throughout your WorkCenters

2 **My Accounts** displays your associated accounts

* If you work with other states that utilize Procorem, you may have other accounts listed under this section

3 **My Favorites** lists any WorkCenters you have selected as a favorite for easy access.

Introduction to WorkCenters

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INTRODUCTION TO WORKCENTERS – Key Benefits

WorkCenters are secure, private, online spaces that descend directly from your Account, and **allows you to store, share, and collaborate** with other assigned members within the WorkCenters. Once your account is established in Procorem, a DCA Procorem Administrator will add you to project WorkCenters.
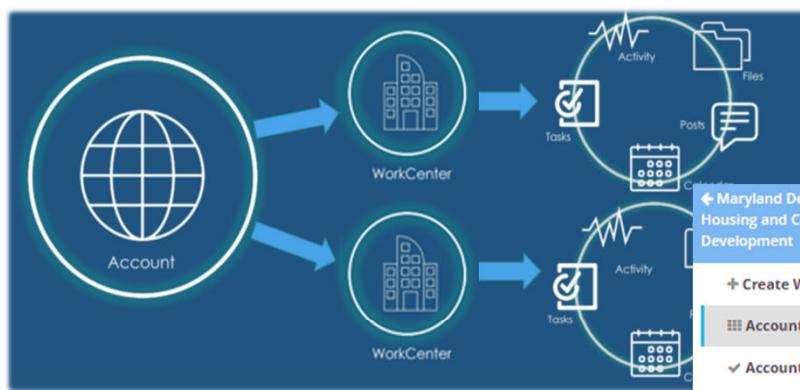
Key Benefits of WorkCenters

Allows you to:
- ✓ Upload and download important documents
- ✓ Manage and Assign tasks and track their progress
- ✓ Maintain an audit history of all project activity
- ✓ Provides security and privacy for sensitive information

WorkCenters Collaborators

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INTRODUCTION TO WORKCENTERS – Collaborators

Collaborators are the individuals, both internal and external, that have been invited to the WorkCenter.

Communicating with Collaborators

➢ **Post** are delivered to Collaborator's email AND tracked in Procorem
➢ **Reply to WorkCenter Posts** directly from your email

Uploading Documents to Procorem

WORKCENTERS -Uploading Documents

✓ **Naming Convention for Document Uploads:** File Type_Property Name_HFA Number_Upload Date(year.day.month)

✓ Select the File folder where you would like to upload a document

✓ Select the appropriate Subfolder

✓ Select **Upload Files**

✓ **Either drag & drop the file** from wherever you have it saved. **Or select the Choose File button** to upload the file.

✓ Although the Status, Type Description and Comment fields are not required, **we encourage you to complete each section for accuracy.**

> *NOTE: After completing the document upload, an email notification will be sent to your DCA Portfolio Manager and will include the comment from this screen in the body of the email.*

Procorem Resources & Support

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PROCOREM RESOURCES & SUPPORT

For technical assistance with Procorem, contact the
DHCD ProLink Support mailbox

Support Mailbox
dhcd.prolinksupport@maryland.gov

For specific questions regarding your property,
contact your DCA Portfolio Manager

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Begin Using Procorem as Your Primary Communication Tool!

➢ **Starting January 2026, all communication, documentation, and collaboration with DCA must occur inside Procorem**

1. Create or Activate Your Procorem Account
- Look for your welcome email from Procorem.
- Follow the link to set up your username and password.
- Log in to confirm access works properly.

2. Update Your Profile & Notification Settings
- Add or correct your contact details.
- Adjust email notification preferences so you're alerted to new tasks, comments, or file uploads.

3. Review Your Assigned WorkCenters
- Navigate to your dashboard and open your project WorkCenters.
- Confirm that each project you manage is listed.
- Notify your DHCD/DCA contact if something is missing.

4. Complete Any Assigned Tasks
- Open the Tasks tab in your WorkCenter(s).
- Review due dates and submit required items through Procorem

5. Explore the File Structure
- Review posted documents, templates, forms, and guidance materials.
- Ensure your team knows where to locate compliance, reporting, and inspection files.

6. Communicate Through Procorem Posts
- Use **Posts** for official communication with DCA regarding your project.
- Keep project-related questions and documents within Procorem for tracking and compliance.

7. Monitor for Future Training & Updates
- Stay alert to emails from the ProLink Support mailbox to receive upcoming training announcements, training materials and Procorem updates.

8. Contact Support When Needed
- For technical assistance with Procorem, contact the DHCD **ProLink Support mailbox**
- For password assistance logging into Procorem, contact **Support@prolinksolutions.com**
- **Contact your DCA Portfolio Manager** for questions about tasks, documents, or WorkCenter setup.

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FAQs

	Question	Answer
1	When should I expect to receive an email invitation to access Procorem?	By the end of January 2026
2	How do I create my Procorem account?	You will receive an email invitation from a DCA Administrator, inviting you to join a WorkCenter in Procorem, prompting you to create your account. Click the link in the email and follow the prompts to set up your username and password.
3	Will this presentation be shared after today	Yes, a link to the presentation and System Demos will be provided by Friday, 12/12
4	I didn't receive my invitation. What should I do?	Check your spam/junk folder for an email from Procorem. If you still can't locate it, contact dhcd.prolinksupport@maryland.gov for assistance.
5	How do I access my project WorkCenters?	Once your account is created, a DCA Administrator will add you to the appropriate WorkCenters. All assigned WorkCenters will appear automatically when you log in.
6	How will I know if I have posts, new documents or tasks?	Procorem sends automatic email notifications when: • New documents are posted • Comments are added • Tasks are assigned or due • WorkCenter updates occur
7	How do I reset my password?	• Click **Forgot Password?** on the login screen and follow the prompts. If issues continue, contact Procorem Support.
8	Can I add other staff members to a WorkCenter?	• No. Only Procorem Administrators can add or remove users from a WorkCenter. • Contact your DCA Portfolio Administrator if you need additional users added to a WorkCenter

MY PROFILE - PICTURE TAB – Email Preferences

MY PROFILE – INVITES TAB – Email Preferences

MY PROFILE - SECURITY TAB **– Resetting Password**

MY PROFILE - PREFERENCES TAB – Email Preferences

Please be aware that by choosing to turn off email notifications, you may miss posts or comments from DCA that could result in processing delays.

VIEWING WORKCENTERS

- From your Home screen, in the lefthand navigation menu, you will find WorkCenters you've recently visited under **Recent WorkCenters**

- If you are in multiple WorkCenters, select **View All WorkCenters** to see a list of the WorkCenters you are assinged to.

COMPLETING TASKS

After files have been uploaded, **mark the corresponding task as complete**

COMPLETING TASKS

To mark complete, **select the task**

Under **Assigned To**, select the **Mark Finished** checkbox.
A pop-up message will appear asking if you are sure you want to finish the task. Select **OK**.

Mark Finished box will change to **Finished**

A Green banner will appear at top of the screen, confirming the task finished successfully.

Do not mark a task as completed until all of the required documents have been submitted

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