



# Procorem Training Presentation

December 10, 2025

## HOUSEKEEPING

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- ✓ 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

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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



# Introduction to Procorem

# INTRODUCTION TO PROCOREM – Learning Objectives

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## You will learn...

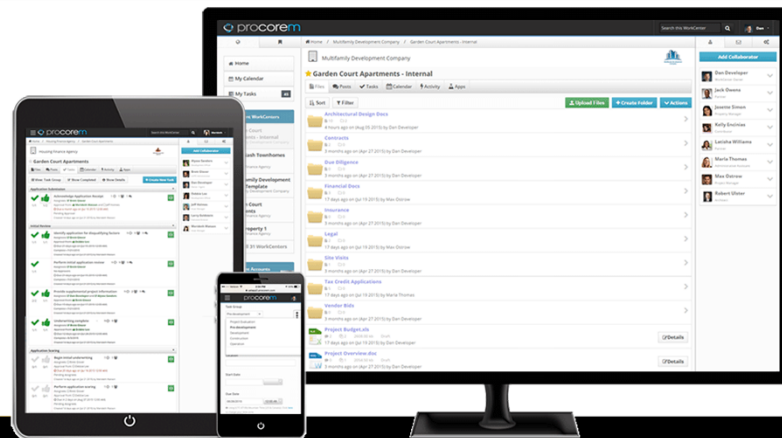
- What Procorem is and how it can streamline your processes
- Procorem Structure and Terminology

# 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.

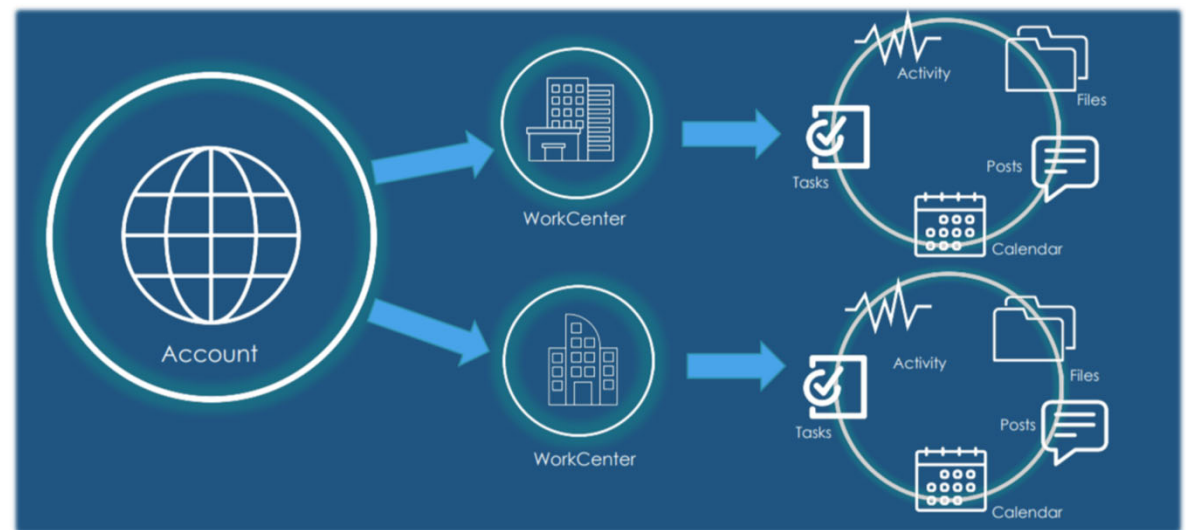


# INTRODUCTION TO PROCOREM – Procorem Structurer

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
<b>Account</b>	An account is the <b>top level in Procorem</b> and is typically used to represent an organization or department <b>within your organization</b> . In your account, you are a member of Procorem who can, upload and store documents, create task deadlines, and more.
<b>WorkCenters</b>	WorkCenters roll up directly to accounts. For every account, you can have an unlimited number of WorkCenters. <b>Think of WorkCenters as a secure, online space which allows users to store, share and collaborate on work</b> . 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.
<b>Files &amp; Folders</b>	Easily store, share, and collaborate on any type of files with Procorem.
<b>Posts</b>	Maintain a complete history of your project communications by using comments within Procorem. <b>Comment on the WorkCenter, document, or task to collaborate with your team</b> . 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	<b>Assign tasks to users within the WorkCenter, sort and filter your tasks for easy project management,</b> 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 <b>monitor task progress and keep your team on track</b> with important events.
Activity	Procorem's activity feed <b>keeps an auditable history of all events and interactions that take place within the system.</b> 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

# PROCOREM ONBOARDING - Invitation & Account Creation

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## You will learn how to...

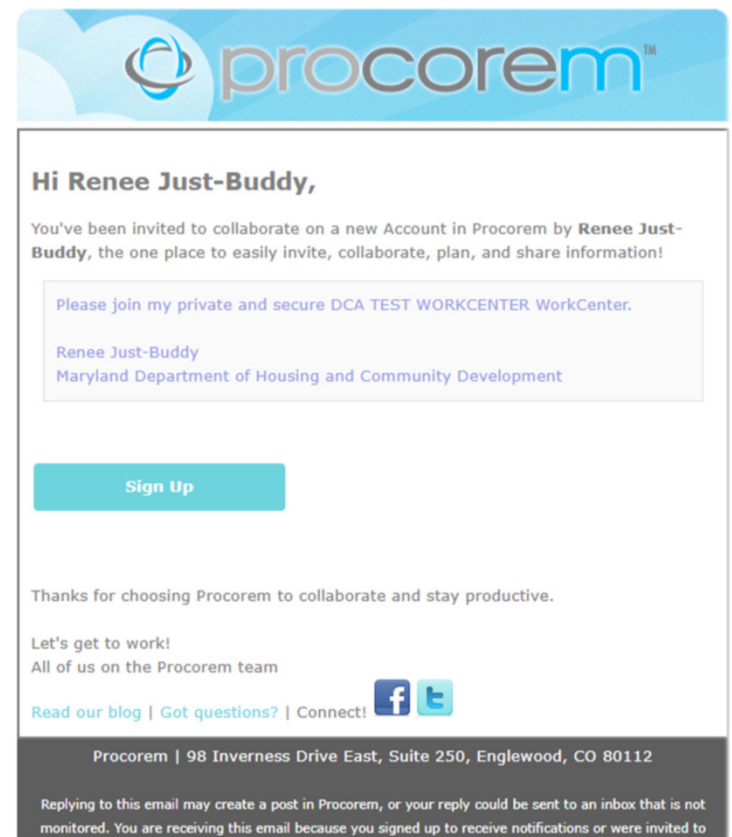
- Create Your Procorem Account
- Access Procorem
- Update Your Profile

## 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.\*\*\***



# 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.**

The Procorem logo is displayed in a light blue header bar. The word "procorem" is in a lowercase, sans-serif font, with "pro" in grey and "corem" in blue.

## 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!

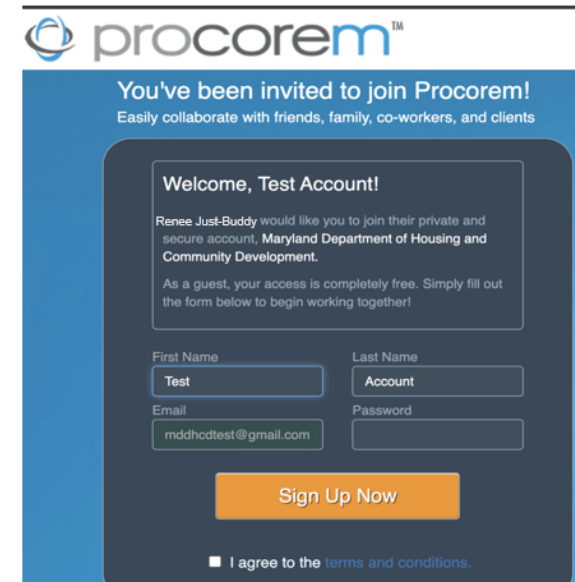
All of us on the Procorem team

[Read our blog](#) | [Got questions?](#)

## 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**



The screenshot shows an email invitation from Procorem. At the top is the Procorem logo. Below it, the text reads: "You've been invited to join Procorem! Easily collaborate with friends, family, co-workers, and clients". The main content area is titled "Welcome, Test Account!" and contains a message from "Renee Just-Buddy" inviting the user to join a private and secure account for the "Maryland Department of Housing and Community Development". It states that as a guest, access is free and the user should fill out the form below. The form has four fields: "First Name" (pre-filled with "Test"), "Last Name" (pre-filled with "Account"), "Email" (pre-filled with "mddhdtest@gmail.com"), and "Password". Below the fields is an orange "Sign Up Now" button. At the bottom, there is a checkbox labeled "I agree to the terms and conditions."

# PROCOREM ONBOARDING - Accessing Procorem

## When Logging into Procorem

1

### Use One of the Supported Web Browsers

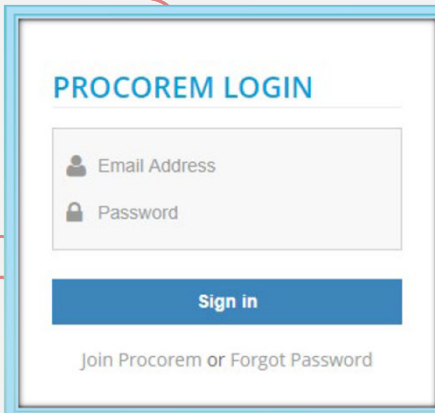
- ✓ Google Chrome - Recommended
- Mozilla Firefox
- Apple Safari
- Microsoft Edge

2

### Enter Your:

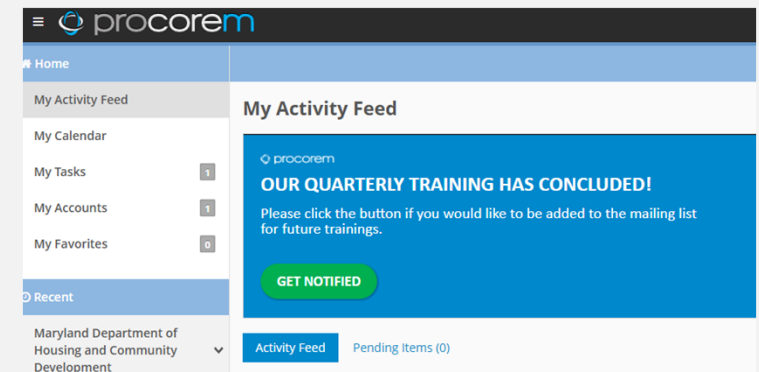
- Email Address
- Password

\*Use the Forgot Password link to request a new password\*



3

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



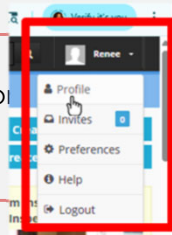
# PROCOREM ONBOARDING - Updating Your Profile

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**

A screenshot of the Procorem profile update form. The form has fields for First Name, Last Name, Email, Phone, Time Zone, and Address. There is a 'Save Changes' button at the bottom right. A red arrow points to the 'Save Changes' button.

3

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



## Additional Features on Your Profile Page

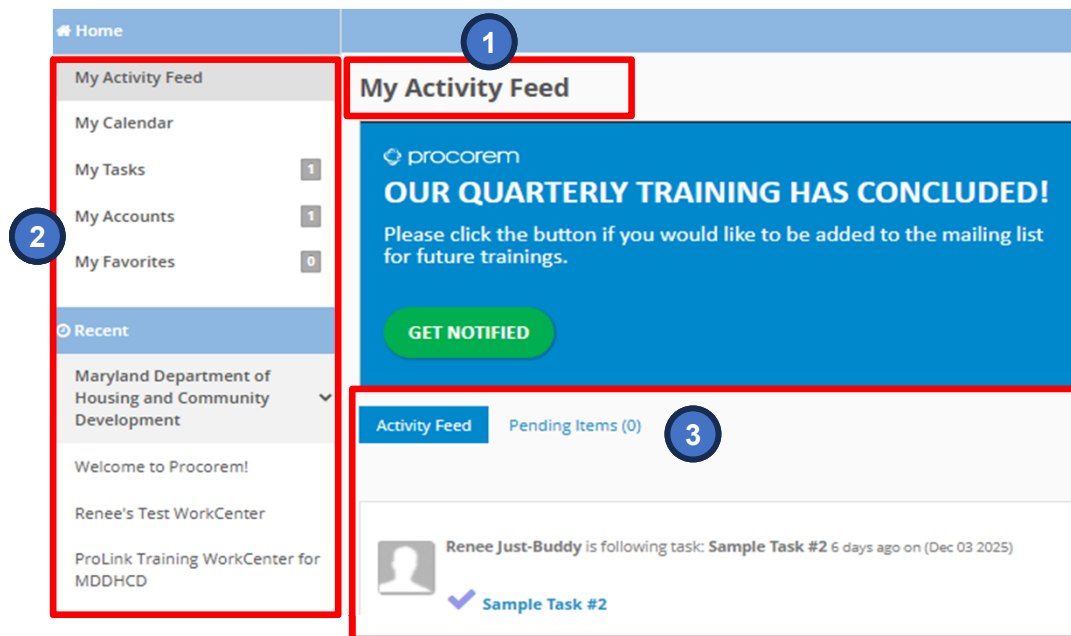
- **Picture** - Add a profile picture
- **Invites** - See a list of WorkCenters that you have been invited to
- **Security** - Change/Update your password
- **Preferences** - update your email preferences to:
  - Receive email notifications
  - Turn off email notifications
  - Select how often you would like to receive email digests, if you opt-in to do so.
- **Background Processes** is information managed by the ProLink/Procorem Administrator





# Navigating Features

# 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.

Home

My Activity Feed

**My Calendar**

My Tasks

My Accounts

My Favorites

Recent

Maryland Department of Housing and Community Development

Home / My Calendar

<

>

December 2025

month week day

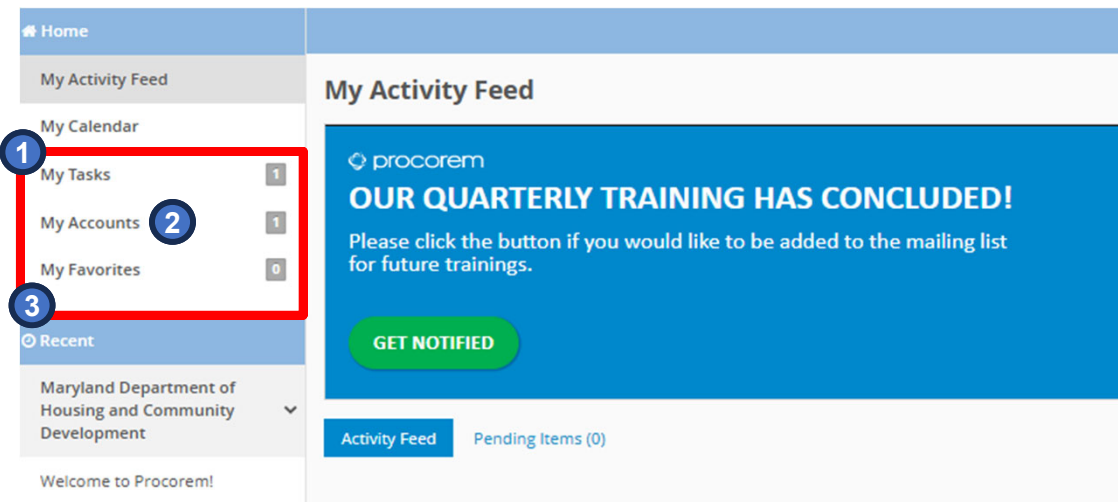
Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	1	2	3	4	5	6
			<div>10a Maryland Department of Housing and Community Development - Renee's Test WorkCenter - Sample Task - in on site; property name; this field is not required</div>		<div>2p Maryland Department of Housing and Community Development - Renee's Test WorkCenter - Sample Task #2 - Don't add a Start Date for tasks dependent on a previous Tasks, because they can't begin until the predecessor ends</div>	
7	8	9	10	11	12	13

My Calendar

Calendar views allow you to access important information on a variety of levels. With My Calendar, you can quickly see all the tasks you are a part of across all your projects in an easy to read calendar view.

To learn more about Calendars in Procorem, check out the [Task & Calendar Introduction](#) article.

# NAVIGATING FEATURES - My Tasks, Accounts & Favorites



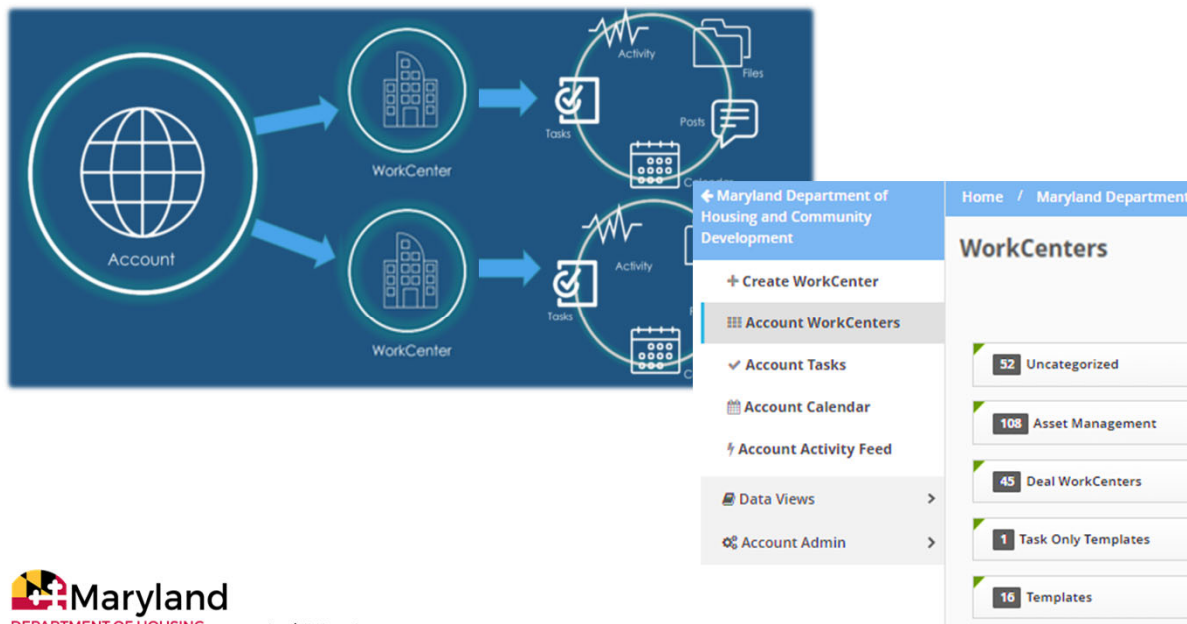
- 1 My Tasks** displays any tasks assigned to you throughout your WorkCenters
- 2 My Accounts** displays your associated accounts  
*\* If you work with other states that utilize Procorem, you may have other accounts listed under this section*
- 3 My Favorites** lists any WorkCenters you have selected as a favorite for easy access.



# Introduction to WorkCenters

# 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



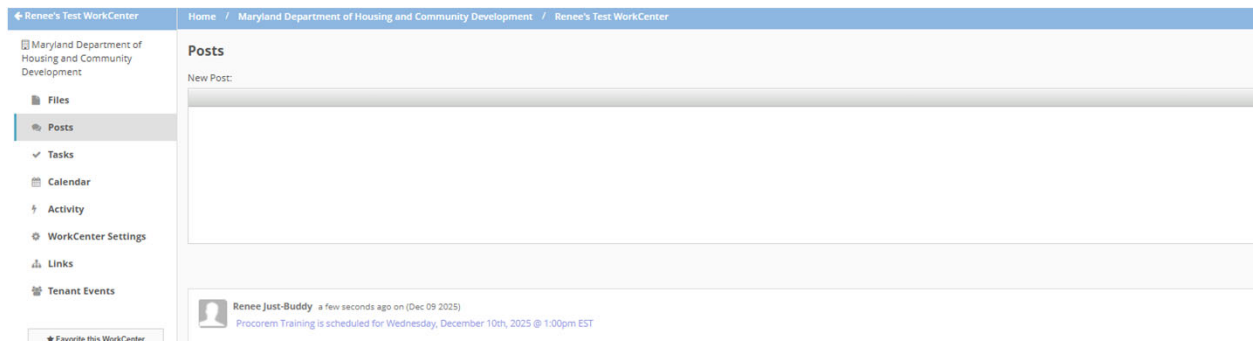
# WorkCenters Collaborators








# 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



Collaborator		
	<b>Bobby Newport</b> Property Manager	▼
	<b>Chris Traeger</b> Agency Asset Manager	▼
	<b>Donna Meagle</b> Compliance Specialists	▼
	<b>Gregory Eddie</b> CPA	▼
	<b>Janine Teagues</b> Property Owner	▼
	<b>Leslie Knope</b> Managing Agent	▼
	<b>Melissa Schemmenti</b> Managing Agent	▼





# 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.

The screenshot displays the 'procorem' web application interface. The top navigation bar includes a search function and a user profile icon labeled 'Test'. The breadcrumb trail indicates the current location: 'Testing and Community Development / Test Workcenter / Application Submission Package / Part 1 - Application and Certifications / Upload Files'. The left sidebar shows a navigation menu with options: Files, Posts, Tasks, Calendar, Activity, and Links. Below the menu are buttons for 'Favorite this WorkCenter' and 'Email this WorkCenter'. The main content area is titled 'Select Files' and features a large dashed box for 'Drag and drop multiple files' and a 'Choose File' button. Below this, there are dropdown menus for 'Status' and 'Type', both currently set to '--Select--'. There are also text input fields for 'Description' (with a placeholder 'Include a description for all uploaded file(s)') and 'Comment' (with a placeholder 'Comments will be included in email alerts sent to other collaborators.'). At the bottom right, there are 'Cancel' and 'Upload' buttons.



# Procurement Resources & Support

## PROCOREM RESOURCES & SUPPORT

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



Support Mailbox  
[dhcd.prolinksupport@maryland.gov](mailto:dhcd.prolinksupport@maryland.gov)

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



## 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**

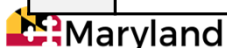
- Stay alert to emails from the ProLink Support mailbox to receive upcoming training announcements, training materials and Procorem updates.

### 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](mailto:Support@prolinksolutions.com)
- **Contact your DCA Portfolio Manager** for questions about tasks, documents, or WorkCenter setup.

# 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 <a href="mailto:dhcd.prolinksupport@maryland.gov">dhcd.prolinksupport@maryland.gov</a> 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: <ul style="list-style-type: none"> <li>• New documents are posted</li> <li>• Comments are added</li> <li>• Tasks are assigned or due</li> <li>• WorkCenter updates occur</li> </ul>
7	How do I reset my password?	<ul style="list-style-type: none"> <li>• Click <b>Forgot Password?</b> on the login screen and follow the prompts. If issues continue, contact Procorem Support.</li> </ul>
8	Can I add other staff members to a WorkCenter?	<ul style="list-style-type: none"> <li>• No. Only Procorem Administrators can add or remove users from a WorkCenter.</li> <li>• Contact your DCA Portfolio Administrator if you need additional users added to a WorkCenter</li> </ul>



DEPARTMENT OF HOUSING  
AND COMMUNITY DEVELOPMENT

Jacob R. Day, Secretary  
Julia Glanz, Deputy Secretary

## MY PROFILE - PICTURE TAB – Email Preferences

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Change Picture


## MY PROFILE – INVITES TAB – Email Preferences

[Profile](#) [Picture](#) [Invites](#) [Security](#) [Preferences](#) [Background Processes](#)

### Pending Invites

No Invites Found

### Received Invites



**Dee Pucciarelli** invited you to **Maryland Department of Housing and Community Development**  
⌚ 5 months ago on (Jul 24 2025)  
  
Accepted 5 months ago on (Jul 25 2025)

### Sent Invites

No Invites Found



# MY PROFILE - SECURITY TAB – Resetting Password

procorem

Search all of Procorem

Test

Home

My Activity Feed

My Calendar

My Tasks

My Accounts

My Favorites

Recent

Maryland Department of Housing and Community Development

Test Workcenter

View All 1 WorkCenters

Go to Account

Home / Your Profile

Test Account

ProfilePictureInvitesSecurityPreferencesBackground Processes

Change Password

Current password

New password

Password strength: Too short

Confirm new password

Password strength: Too short

Enter current password.

Current password cannot be the same as the new password.

Please enter a password.

Cannot contain spaces.

Contains at least 1 number.

Contains at least 1 capital letter.

Contains at least 1 lowercase letter.

Must be at least 8 characters long.

Previous passwords cannot be reused.

Profile Screen

The profile screen gives you the power to control how you provide and receive information. Update key information such as your time zone, upload a profile picture, control email frequency, change your password, and more within the profile screen.

Learn more about your profile by heading over to the [Procorem Help Center](#).

# 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.

The screenshot displays the Procorem user interface. At the top, the Procorem logo is on the left, and a search bar and user profile (Test) are on the right. A left sidebar contains navigation links: Home, My Activity Feed, My Calendar, My Tasks (0), My Accounts (1), My Favorites (0), Recent (selected), Maryland Department of Housing and Community Development (expanded), Test Workcenter, and View All 1 WorkCenters. A 'Go to Account' button is at the bottom of the sidebar. The main content area is titled 'Test Account' and includes tabs for Profile, Picture, Invites, Security, Preferences (active), and Background Processes. Under the Preferences tab, the 'Email notifications?' section has two radio buttons: 'Yes, send me email notifications (including file upload alerts, assigned tasks, posts, comments, etc)' (selected) and 'No, please turn off email notifications (we will still send you task emails if you are a assignee, approver, or follower and system messages - account invites, reset password, etc)'. Below this is a dropdown menu for 'Select how often you'd like to receive a digest email' set to 'Daily'. A 'Save Changes' button is to the right. Further down, a section for 'Configure email preferences for the following account' shows a '--Select--' dropdown. A message at the bottom states: 'Select an account to configure your email notification preferences.'

procorem

Search all of Procorem

Test

Home / Your Profile

**Test Account**

Profile Picture Invites Security Preferences Background Processes

Email notifications?

☒ Yes, send me email notifications (including file upload alerts, assigned tasks, posts, comments, etc)

☐ No, please turn off email notifications (we will still send you task emails if you are a assignee, approver, or follower and system messages - account invites, reset password, etc)

Select how often you'd like to receive a digest email

Daily

Save Changes

Configure email preferences for the following account

--Select--

Select an account to configure your email notification preferences.

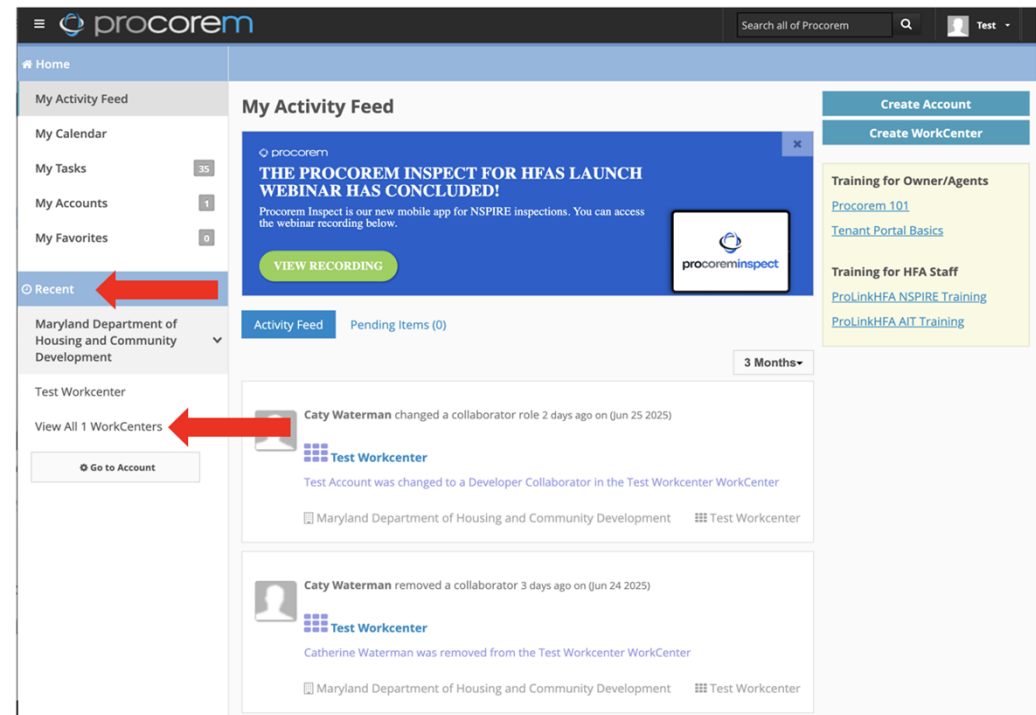
**Profile Screen**

The profile screen gives you the power to control how you provide and receive information. Update key information such as your time zone, upload a profile picture, control email frequency, change your password, and more within the profile screen.

Learn more about your profile by heading over to the [Procorem Help Center](#).

# 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 assigned to.



# COMPLETING TASKS

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

The screenshot displays the Procorem Test Workcenter interface. The left sidebar contains navigation options: Files, Posts, Tasks (selected), Calendar, Activity, Links, and Tenant Events. The main content area shows a list of tasks under the heading 'Application Submission Package (Detailed)'. Each task is marked as complete with a checkmark and a '0/1' status. The tasks are:

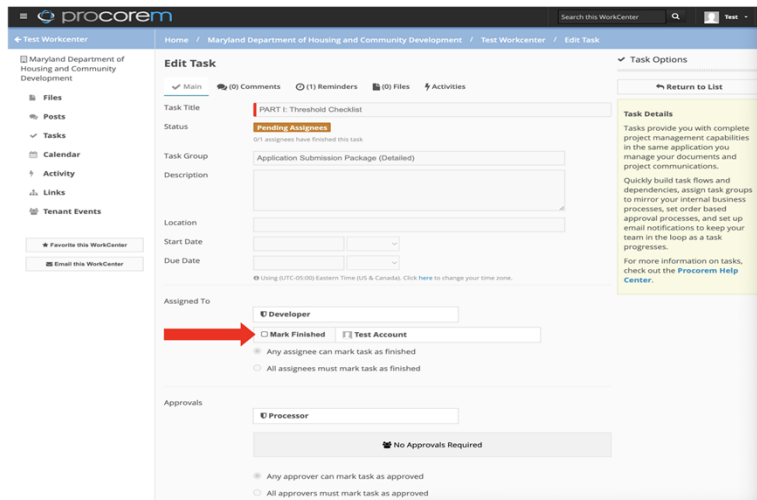
- PART I: CDA Form 202 Multifamily Rental Financing Application** (1 icon)
  - Assignees: □ Test Account - Developer
  - No Approvers - Processor
  - Pending Assignees
  - Created 3 days ago on (Jun 24 2025) by Caty Waterman
- PART I: Certifications** (1 icon)
  - Assignees: □ Test Account - Developer
  - No Approvers - Processor
  - Pending Assignees
  - Created 3 days ago on (Jun 24 2025) by Caty Waterman
- PART I: Threshold Checklist** (1 icon)
  - Assignees: □ Test Account - Developer
  - No Approvers - Processor
  - Pending Assignees
  - Created 3 days ago on (Jun 24 2025) by Caty Waterman
- PART I: Applicant Self-Scoring** (1 icon)
  - Assignees: □ Test Account - Developer
  - No Approvers - Processor
  - Pending Assignees
  - Created 3 days ago on (Jun 24 2025) by Caty Waterman
- PART I: Organizational Charts - Current, if applicable, and Proposed** (1 icon)
  - Assignees: □ Test Account - Developer
  - No Approvers - Processor
  - Pending Assignees
  - Created 3 days ago on (Jun 24 2025) by Caty Waterman
- PART II: Exhibit A: Project Information** (1 icon)
  - Assignees: □ Test Account - Developer
  - No Approvers - Processor
  - Pending Assignees
  - Created 3 days ago on (Jun 24 2025) by Caty Waterman

# 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**.

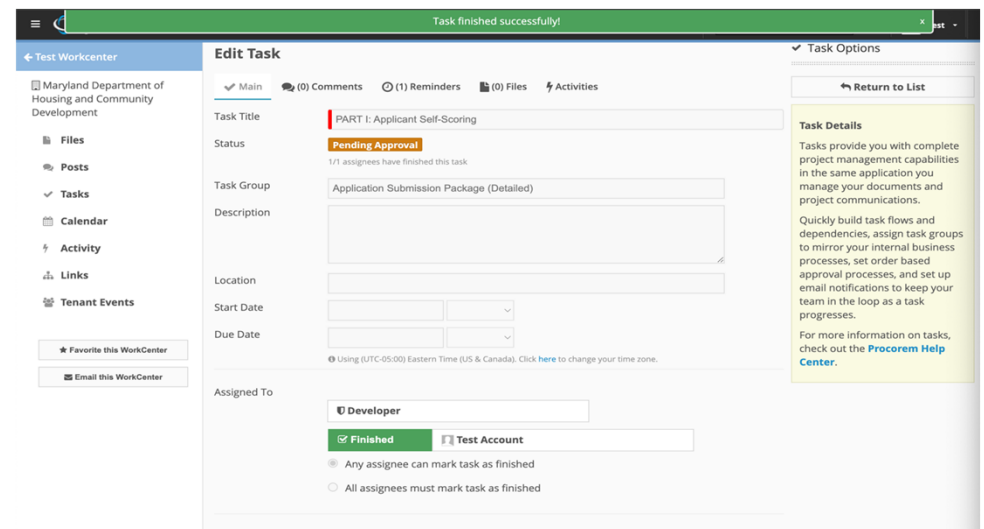


The screenshot shows the 'Edit Task' interface in Procorem. The 'Assigned To' section has a dropdown menu set to 'Developer'. Below it, the 'Mark Finished' checkbox is highlighted with a red arrow. Other options include 'Test Account' and radio buttons for 'Any assignee can mark task as finished' and 'All assignees must mark task as finished'. The 'Status' is currently 'Pending Approval'.

**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**



The screenshot shows the 'Edit Task' interface after the task has been marked as finished. A green banner at the top reads 'Task finished successfully!'. The 'Assigned To' section now shows the 'Finished' checkbox selected. The 'Status' is still 'Pending Approval', but the 'Task Details' sidebar on the right provides information about task management capabilities.