



Procurement Training Presentation

December 10, 2025

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



Introduction to Procurement

INTRODUCTION TO PROCOREM – Learning Objectives

You will learn...

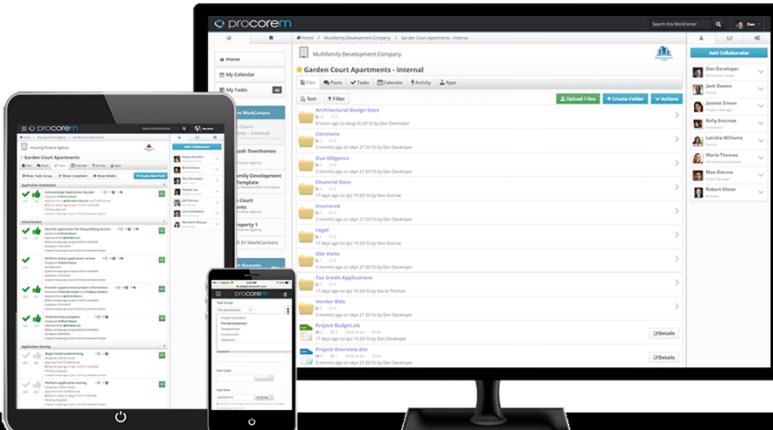
- What Procorem is and how it can streamline your processes
- Procorem Structure and Terminology

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.



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



Procurement Onboarding

Invitation & Account Creation

PROCOREM ONBOARDING - Invitation & Account Creation

You will learn how to...

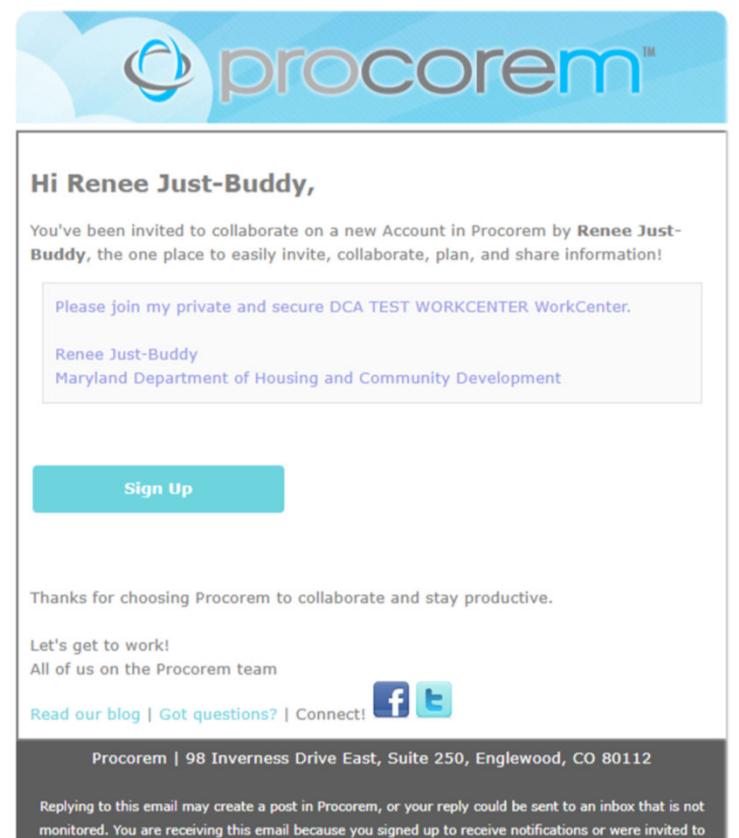
- Create Your Procorem Account
- Access Procorem
- Update Your Profile

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.**



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!](#)

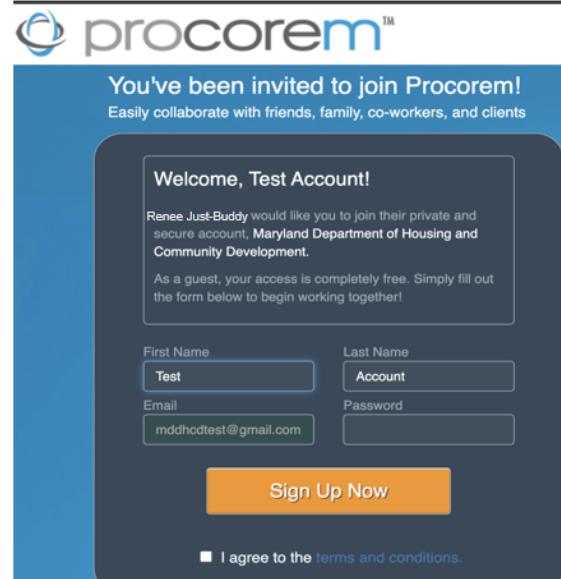
Thanks for choosing Procorem to collaborate and stay productive.

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

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**



PROCOREM ONBOARDING - Accessing Procorem

When Logging into Procorem

1

Use One of the Supported Web Browsers

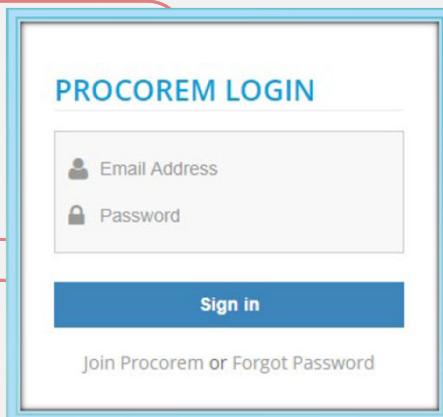
- ✓ Google Chrome - Recommended
- Mozilla Firefox
- Apple Safari
- Microsoft Edge

2

Enter Your:

- Email Address
- Password

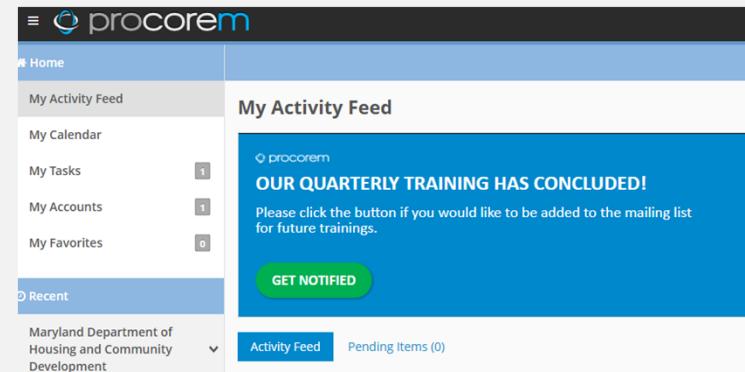
Use the Forgot Password link to request a new password



The image shows the Procorem login page. It features a light blue header with the text 'PROCOREM LOGIN'. Below the header are two input fields: 'Email Address' with a user icon and 'Password' with a lock icon. A blue 'Sign in' button is positioned below the fields. At the bottom of the page, there is a link 'Join Procorem or Forgot Password'.

3

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



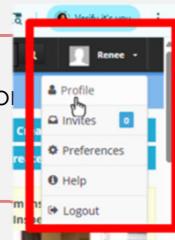
PROCOREM ONBOARDING - Updating Your Profile

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**

3

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



Additional Features on Your Profile Page

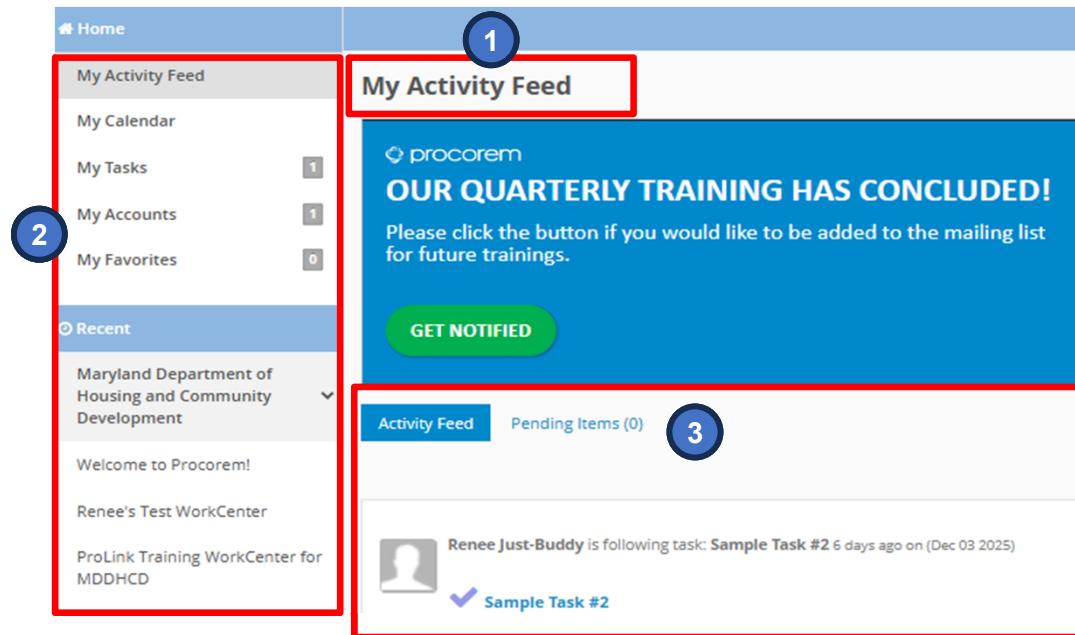
- **Picture** - Add a profile picture
- **Invites** – See a list of WorkCenters that you have been invited to
- **Security** - Change/Update your password

- **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 Procore, you will land on your **Home Screen – My Activity Feed screen**

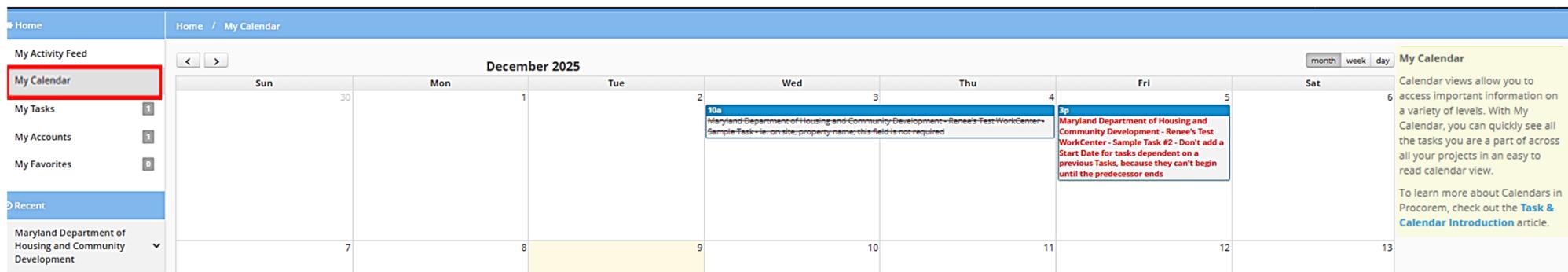
2 The **Left Navigation Menu** offers links to your most recently visited WorkCenters, and other features within Procore.

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

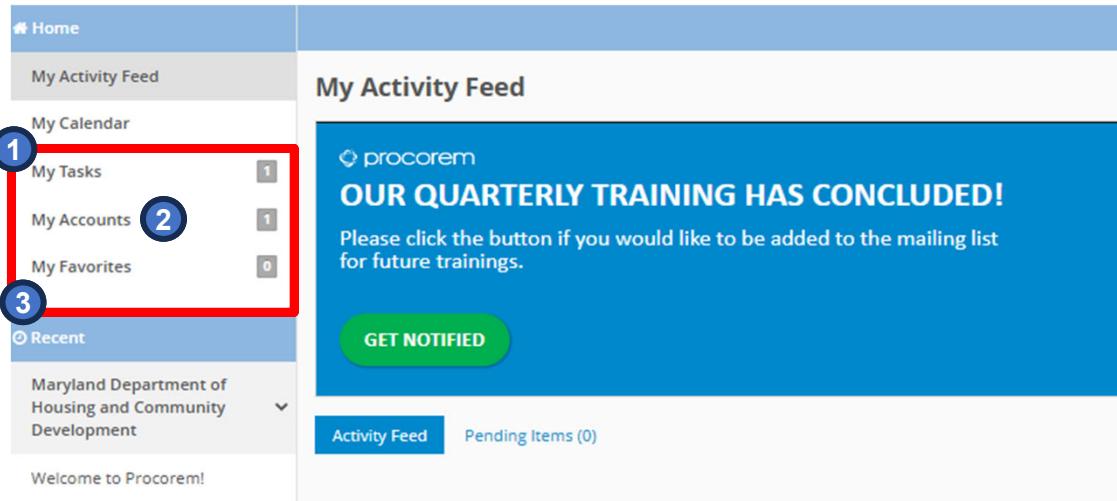
NAVIGATING FEATURES - My Calendar

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



The screenshot shows the Procore interface with the 'My Calendar' feature. The navigation bar at the top has 'Home' and 'My Calendar' selected. The left sidebar includes 'My Activity Feed' with 'My Calendar' highlighted, 'My Tasks' (1), 'My Accounts' (1), 'My Favorites' (0), and a 'Recent' section for 'Maryland Department of Housing and Community Development'. The main content area displays a calendar for December 2025. A task is listed for December 2, 2025, and another for December 3, 2025. A tooltip on the right explains the calendar feature, stating: '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.' It also links to a 'Task & Calendar Introduction' article.

NAVIGATING FEATURES - My Tasks, Accounts & Favorites



Home

My Activity Feed

My Calendar

1 My Tasks

2 My Accounts

3 My Favorites

Recent

Maryland Department of Housing and Community Development

Welcome to Procore!

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)

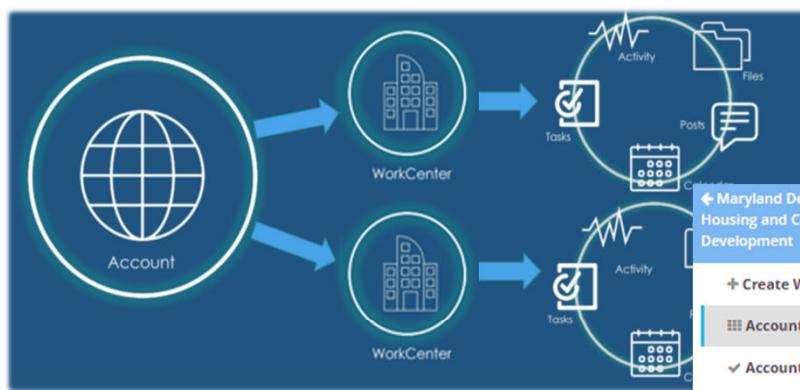
- 1 **My Tasks** displays any tasks assigned to you throughout your WorkCenters
- 2 **My Accounts** displays your associated accounts
 - * If you work with other states that utilize Procore, you may have other accounts listed under this section
- 3 **My Favorites** lists any WorkCenters you have selected 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 Procore, 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

Home / Maryland Department of Housing and Community Development

WorkCenters

- + Create WorkCenter
- Account WorkCenters
- ✓ Account Tasks
- Account Calendar
- Account Activity Feed
- Data Views
- Account Admin

32 Uncategorized

108 Asset Management

45 Deal WorkCenters

1 Task Only Templates

16 Templates



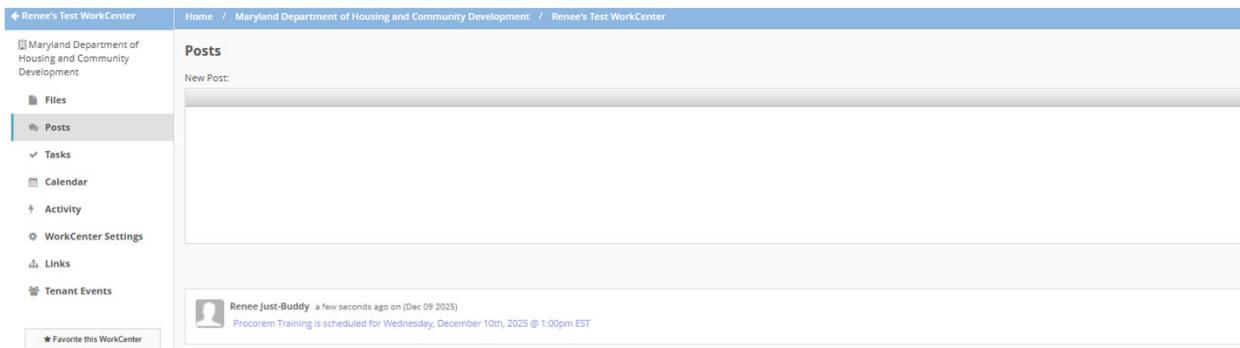
WorkCenters Collaborators

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



The screenshot shows the Procorem WorkCenter interface. On the left, a sidebar menu includes 'Posts' (which is selected and highlighted in blue), 'Tasks', 'Calendar', 'Activity', 'WorkCenter Settings', 'Links', and 'Tenant Events'. The main content area is titled 'Posts' and features a 'New Post:' input field. Below it, a message from 'Renee Just-Buddy' is displayed, stating: 'Procorem Training is scheduled for Wednesday, December 10th, 2025 @ 1:00pm EST'. On the right, a sidebar titled 'Collaborator' lists eight individuals with their names, roles, and small profile pictures:

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

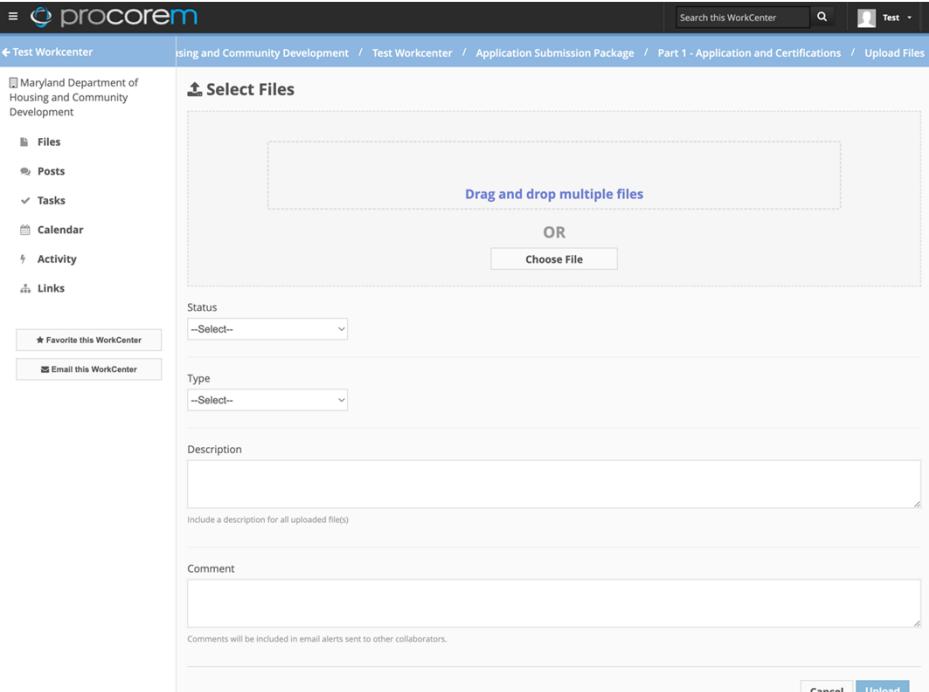


Uploading Documents to Procorem

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 shows the Procore 'Select Files' interface. The left sidebar shows the navigation path: Maryland Department of Housing and Community Development > Test Workcenter > Application Submission Package > Part 1 - Application and Certifications > Upload Files. The main area is titled 'Select Files' and contains a 'Drag and drop multiple files' box and a 'Choose File' button. Below these are fields for 'Status' (a dropdown menu), 'Type' (a dropdown menu), and 'Description' (a text input field with placeholder text 'Include a description for all uploaded file(s)'). There is also a 'Comment' text input field with placeholder text 'Comments will be included in email alerts sent to other collaborators.' At the bottom right are 'Cancel' and 'Upload' buttons.



Procurement Resources & Support

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



Begin Using Procorem as Your Primary Communication Tool!

<p>➤ Starting January 2026, all communication, documentation, and collaboration with DCA must occur inside Procorem</p>	<p>5. Explore the File Structure</p> <ul style="list-style-type: none">• Review posted documents, templates, forms, and guidance materials.• Ensure your team knows where to locate compliance, reporting, and inspection files.
<p>1. Create or Activate Your Procorem Account</p> <ul style="list-style-type: none">• Look for your welcome email from Procorem.• Follow the link to set up your username and password.• Log in to confirm access works properly.	<p>6. Communicate Through Procorem Posts</p> <ul style="list-style-type: none">• Use Posts for official communication with DCA regarding your project.• Keep project-related questions and documents within Procorem for tracking and compliance.
<p>2. Update Your Profile & Notification Settings</p> <ul style="list-style-type: none">• Add or correct your contact details.• Adjust email notification preferences so you're alerted to new tasks, comments, or file uploads.	<p>7. Monitor for Future Training & Updates</p> <ul style="list-style-type: none">• Stay alert to emails from the ProLink Support mailbox to receive upcoming training announcements, training materials and Procorem updates.
<p>3. Review Your Assigned WorkCenters</p> <ul style="list-style-type: none">• 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.	<p>8. Contact Support When Needed</p> <ul style="list-style-type: none">• For technical assistance with Procorem, contact the DHCD <u>ProLink Support mailbox</u>• For password assistance logging into Procorem, contact <u>Support@prolinksolutions.com</u>• Contact your DCA Portfolio Manager for questions about tasks, documents, or WorkCenter setup.
<p>4. Complete Any Assigned Tasks</p> <ul style="list-style-type: none">• Open the Tasks tab in your WorkCenter(s).• Review due dates and submit required items through Procorem	

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: <ul style="list-style-type: none">• New documents are posted• Comments are added• Tasks are assigned or due• WorkCenter updates occur
7	How do I reset my password?	<ul style="list-style-type: none">• 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?	<ul style="list-style-type: none">• 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



[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**

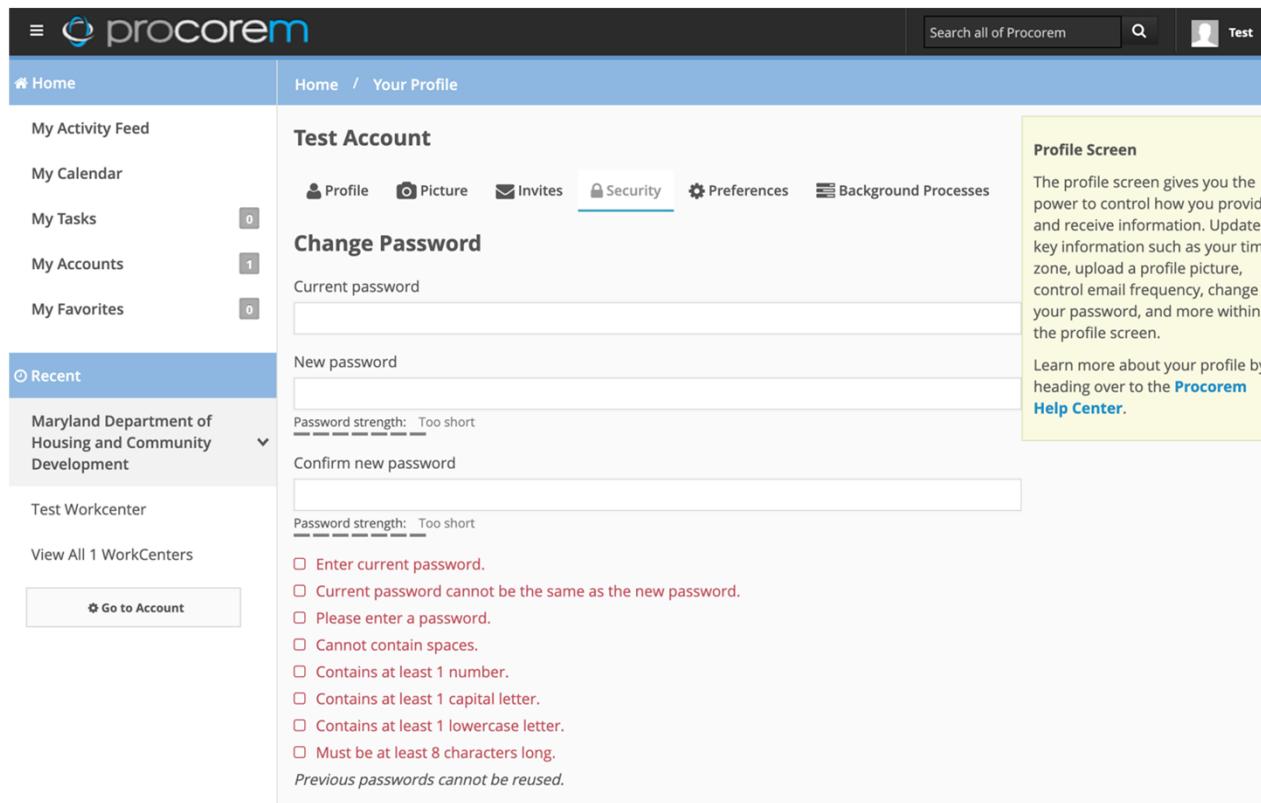
① 5 months ago on (Jul 24 2025)

Accepted 5 months ago on (Jul 25 2025)

Sent Invites

 No Invites Found

MY PROFILE - SECURITY TAB – Resetting Password



The screenshot shows the Procurement System (Procore) interface. The top navigation bar includes the Procore logo, a search bar, and a user dropdown. The left sidebar has a 'Recent' section with a dropdown menu showing 'Maryland Department of Housing and Community Development' and 'Test Workcenter', and a 'Go to Account' button. The main content area is titled 'Test Account' and shows the 'Security' tab selected. It has fields for 'Current password', 'New password', and 'Confirm new password'. Below these fields, a note says 'Password strength: Too short'. A list of validation errors is shown: '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.', and 'Must be at least 8 characters long.' A note at the bottom states 'Previous passwords cannot be reused.' To the right, a sidebar titled 'Profile Screen' provides information about the profile screen and a link to the 'Procurement Help Center'.

≡ procorem

Search all of Procore

Test

Home / Your Profile

Test Account

Profile Picture Invites Security Preferences Background Processes

Change Password

Current password

New password

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 [Procurement Help Center](#).

Recent

Maryland Department of Housing and Community Development

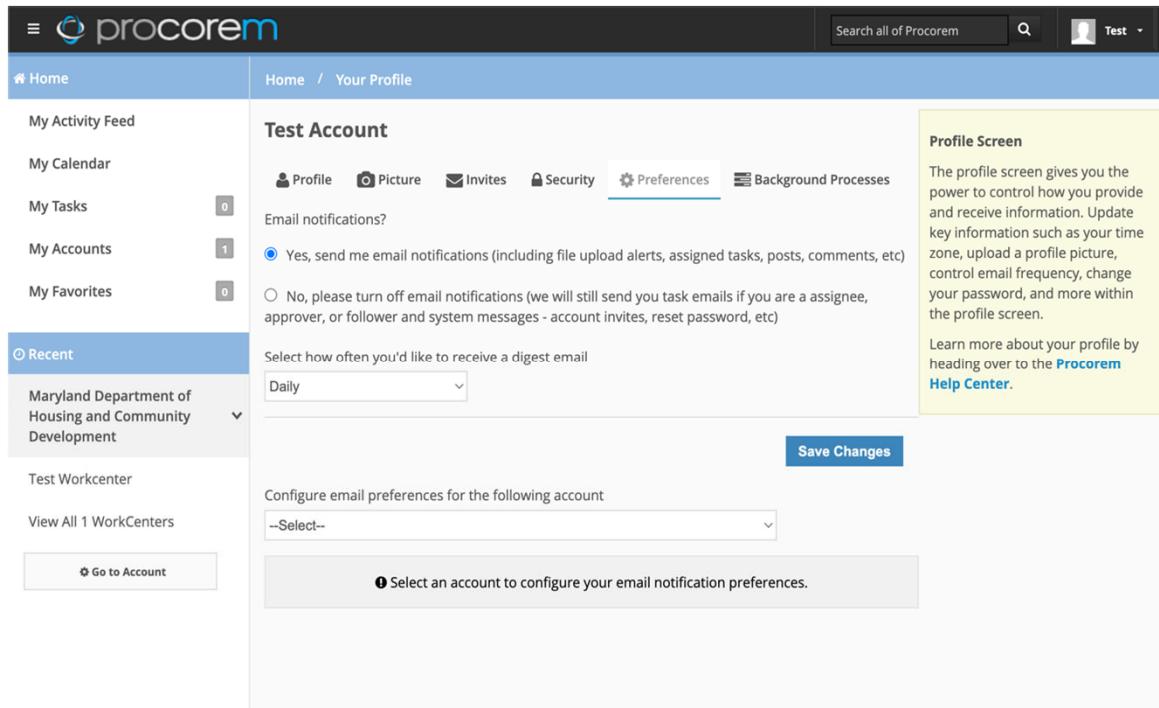
Test Workcenter

View All 1 WorkCenters

Go to Account

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 shows the Procore interface with the 'My Profile' section selected. The 'Preferences' tab is active, specifically the 'Email Preferences' sub-tab. The main content area displays the following:

- Test Account** (Account name)
- 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** button
- Configure email preferences for the following account**
 - Select--
- Important message:** Select an account to configure your email notification preferences.

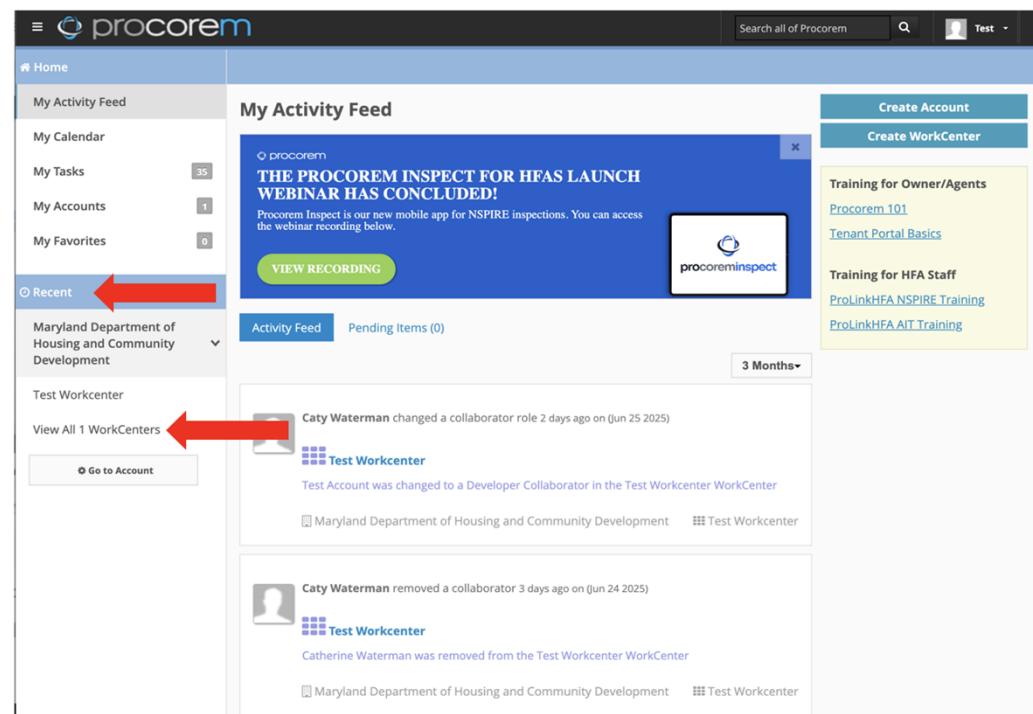
A yellow callout box on the right side provides information about the 'Profile Screen':

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 [Procore Help Center](#).

VIEWING WORKCENTERS

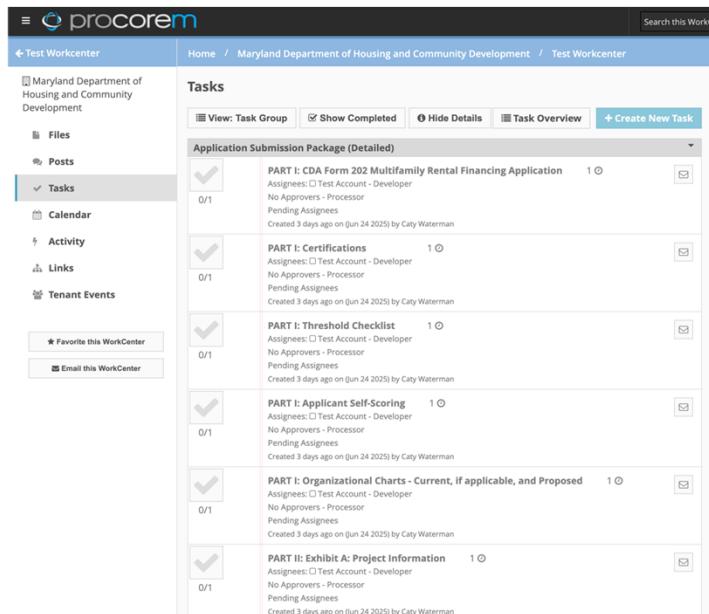
- From your Home screen, in the lefthand navigation menu, you will find WorkCenters you've recently visited under **Recent WorkCenters**
- If you are in multiple WorkCenters, select **View All WorkCenters** to see a list of the WorkCenters you are assigned to.



The screenshot shows the Procore Home screen. On the left, a navigation sidebar lists 'Recent' (highlighted with a red arrow), 'My Activity Feed', 'My Calendar', 'My Tasks' (with 35 items), 'My Accounts' (with 1 item), 'My Favorites', and 'View All 1 WorkCenters' (highlighted with a red arrow). The main content area is titled 'My Activity Feed' and features a banner for the 'THE PROCOREM INSPECT FOR HFAS LAUNCH WEBINAR HAS CONCLUDED!' with a 'VIEW RECORDING' button. Below the banner, there are two activity items: one from 'Caty Waterman' and another from 'Maryland Department of Housing and Community Development'. The right side of the screen includes a search bar, user profile, and various training links for 'Owner/Agents' and 'HFA Staff'.

COMPLETING TASKS

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



The screenshot shows a Procore software interface with a sidebar on the left containing links for Test Workcenter, Maryland Department of Housing and Community Development, Files, Posts, Tasks (which is currently selected), Calendar, Activity, Links, and Tenant Events. The main content area is titled 'Tasks' and shows a list of tasks for an 'Application Submission Package (Detailed)'. The tasks are:

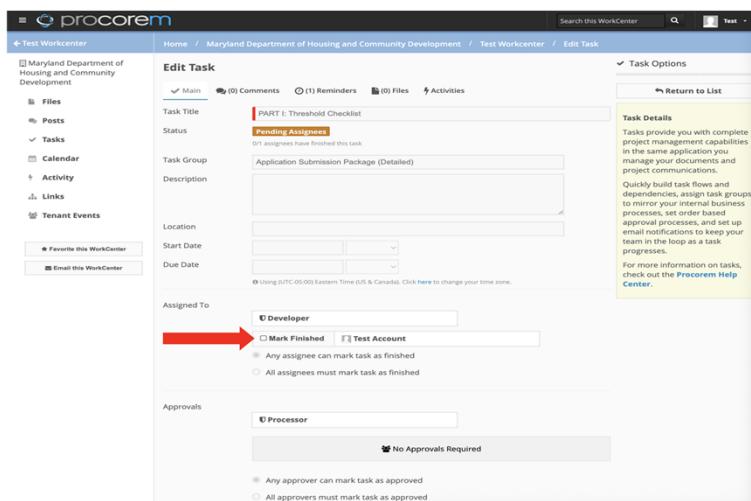
- PART I: CDA Form 202 Multifamily Rental Financing Application (1 task, 0/1 assigned, 0/0 approvers, 0 pending assignees, created 3 days ago)
- PART I: Certification (1 task, 0/1 assigned, 0/0 approvers, 0 pending assignees, created 3 days ago)
- PART I: Threshold Checklist (1 task, 0/1 assigned, 0/0 approvers, 0 pending assignees, created 3 days ago)
- PART I: Applicant Self-Scoring (1 task, 0/1 assigned, 0/0 approvers, 0 pending assignees, created 3 days ago)
- PART I: Organizational Charts - Current, if applicable, and Proposed (1 task, 0/1 assigned, 0/0 approvers, 0 pending assignees, created 3 days ago)
- PART II: Exhibit A: Project Information (1 task, 0/1 assigned, 0/0 approvers, 0 pending assignees, created 3 days ago)

Each task has a checkbox next to it, and all checkboxes are checked, indicating they are marked 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**.

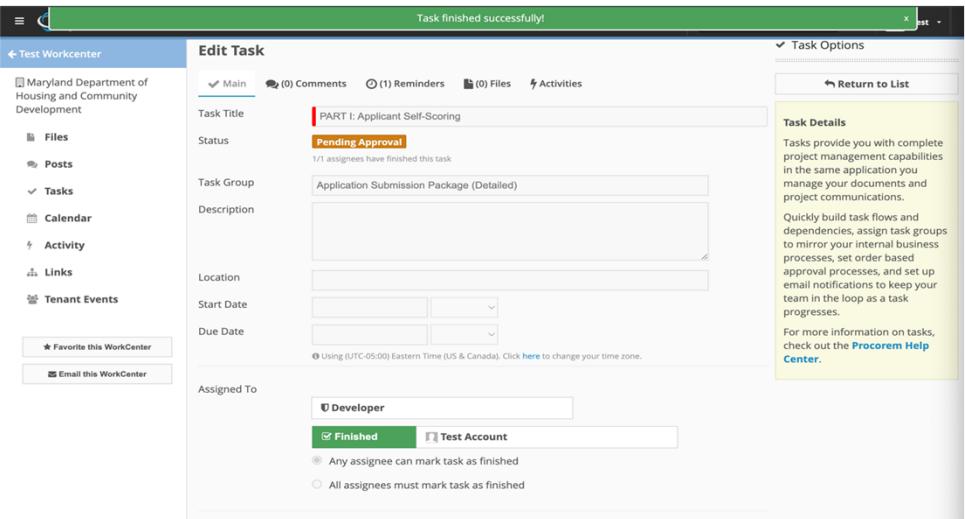


The screenshot shows the 'Edit Task' page in Procore. The 'Assigned To' section is highlighted with a red arrow pointing to the 'Mark Finished' checkbox for 'Developer'. Below the checkbox, there are three radio button options: 'Any assignee can mark task as finished', 'All assignees must mark task as finished', and 'No Approvals Required'.

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' page in Procore after marking the task as finished. The 'Assigned To' section shows the 'Developer' checkbox with a green checkmark. A green banner at the top of the screen displays the message 'Task finished successfully!'. The 'Mark Finished' checkbox for 'Developer' is now checked.