

Procorem Training

October 1, 2025



Background

- Procorem is an external file sharing and communication tool
- Users including project sponsors and developers can download and upload documents, receive updates, track submissions, and communicate with CDA
- Move to fully electronic applications

Getting Started with Procorem

- 1. Request an electronic application folder electronic submission package request form on website
- 2. A WorkCenter will be created for your project; you'll be invited to join
 - a. When first invited to join a Procorem WorkCenter, email invitation to create account

Getting Started with Procorem

- Example of email notification
- Only asked to create account once
- Then, CDA will add you to other project WorkCenters as needed



Hi Test Account,

You've been invited to collaborate on a new Account in Procorem by Caty Waterman, the one place to easily invite, collaborate, plan, and share information!

Please join my private and secure Test Workcenter WorkCenter.

Caty Waterman

Maryland Department of Housing and Community Development

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

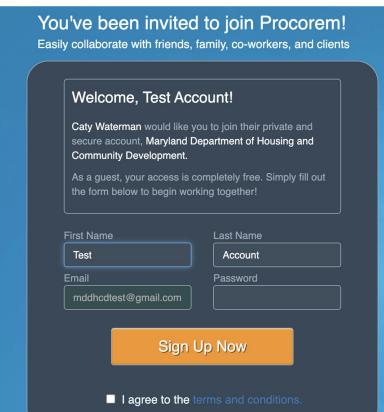
Replying to this email may create a post in Procorem, or your reply could be sent to an inbox that is not monitored. You are receiving this email because you signed up to receive notifications or were invited to collaborate by a colleague. To unsubscribe, click here.



Getting Started with Procorem

Create a password, click that you agree to the terms and conditions, and then click on the orange Sign Up Now button

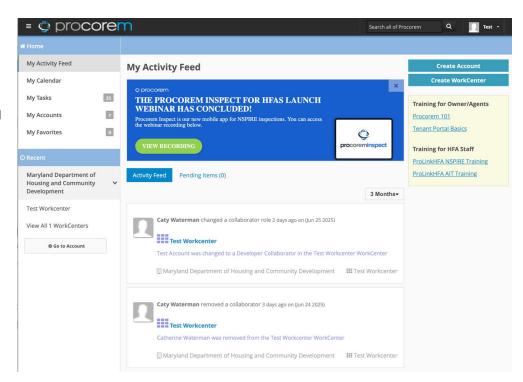




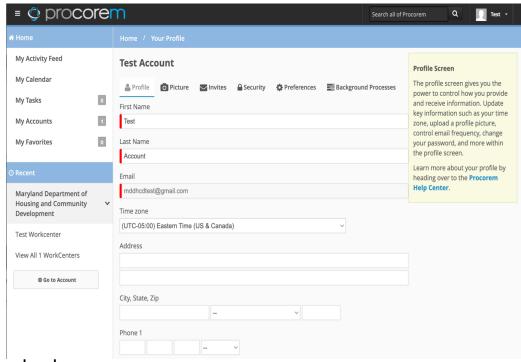


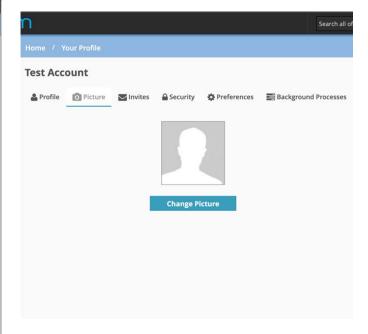
Logging Into Procorem

- Log in, taken to home screen
- Any WorkCenters that you have been invited to join will be on the left side under Recent

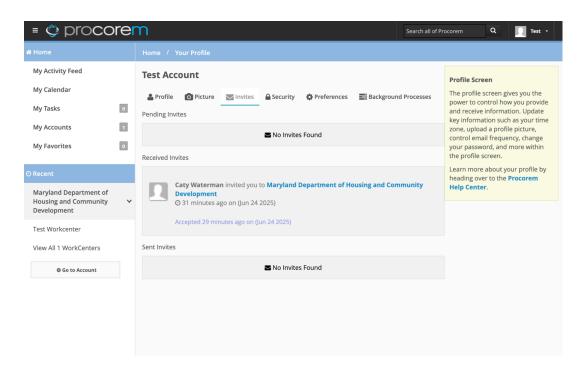


Updating Profile

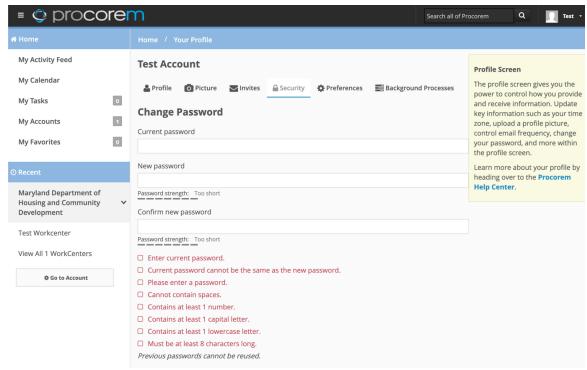




Viewing WorkCenters - Invites Tab on Profile



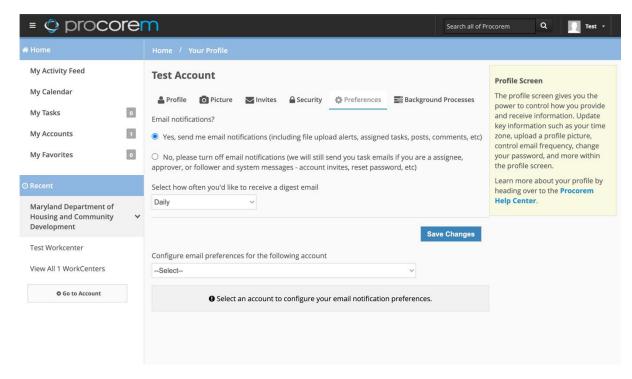
Resetting Password - Security Tab on Profile





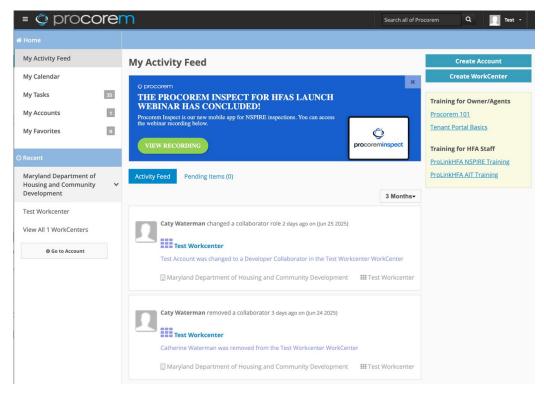
Jacob R. Day, Secretary

Email Preferences - Preferences Tab on Profile



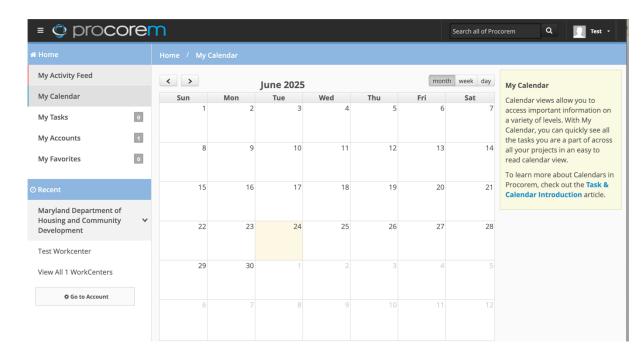
Home Screen - Activity Feed

 Shows what has occurred in your WorkCenters, such as files being uploaded or downloaded, when posts have been made, or when tasks have been made or completed



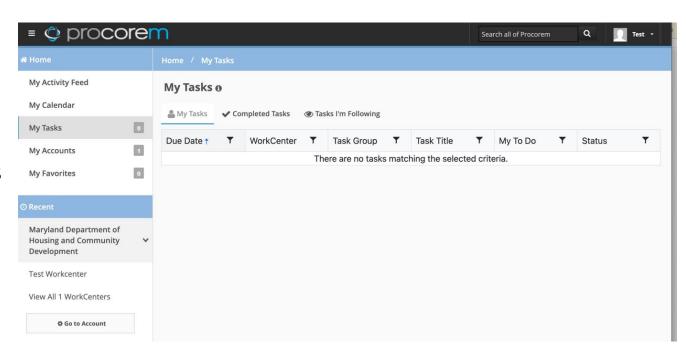
Calendar

 See due dates for any assigned tasks



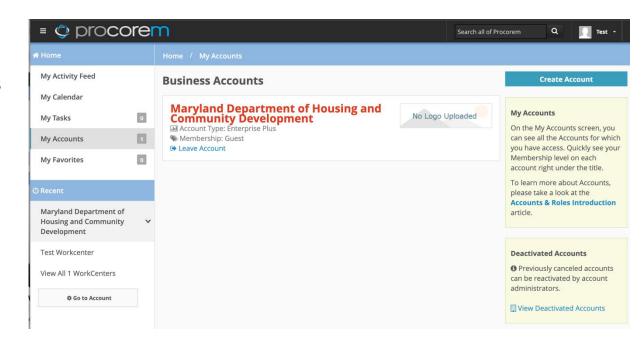
Tasks

 More details about any assigned tasks



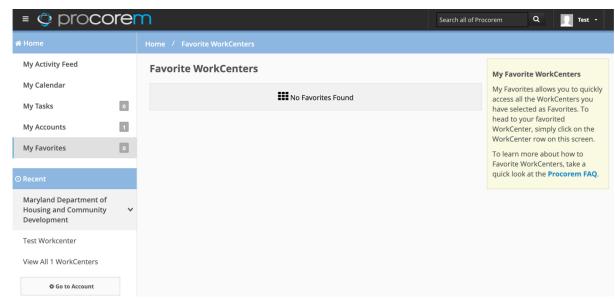
Accounts

- Shows which accounts you are in
- If you work with other states that utilize Procorem, you may have other accounts listed under this section



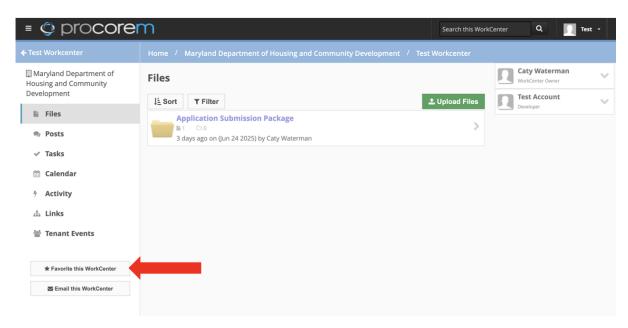
Favorites

Shows any WorkCenters you have favorited



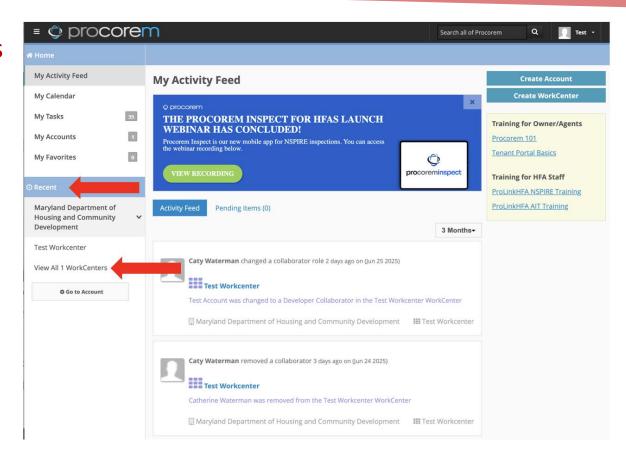
Favoriting a WorkCenter

 Select a WorkCenter and clicking on Favorite this WorkCenter on the lower left side

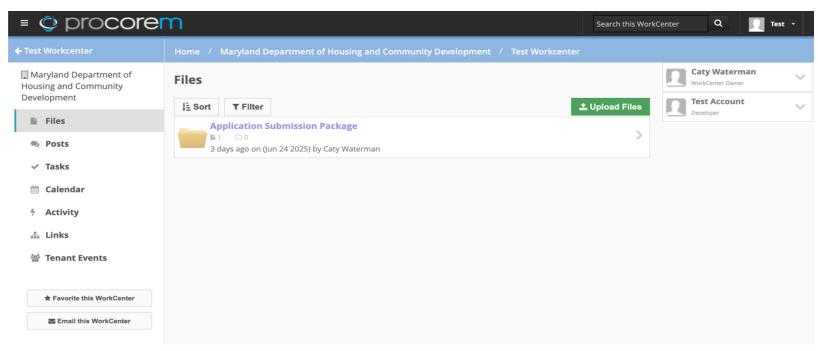


Viewing WorkCenters

- From home screen, recent WorkCenters under the recent section of the left side
- If you are in multiple WorkCenters, click
 View All WorkCenters



WorkCenters

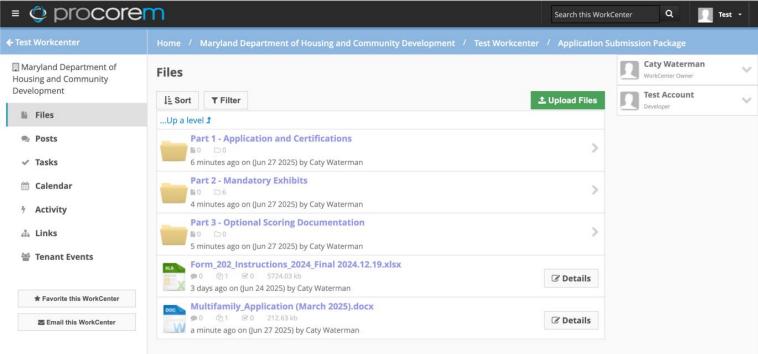




WorkCenters

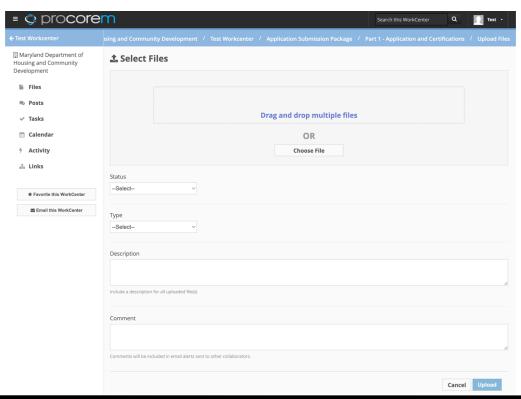
- Different folder structures depending on stage of project (Application Submission, Viability Submission, Commitment Submission, Combined Viability/Commitment Submission)
- See all users with access to WorkCenter on right side
 - If you need to add additional team members email dhcd.rentalhousing@maryland.gov
 - Include the name of the WorkCenter, the first and last names of the individual(s) being added, and their email address
- Folders match submission kits on website
 - Include copies of application materials
 - Must use version of CDA Form 202 in WorkCenter

WorkCenters



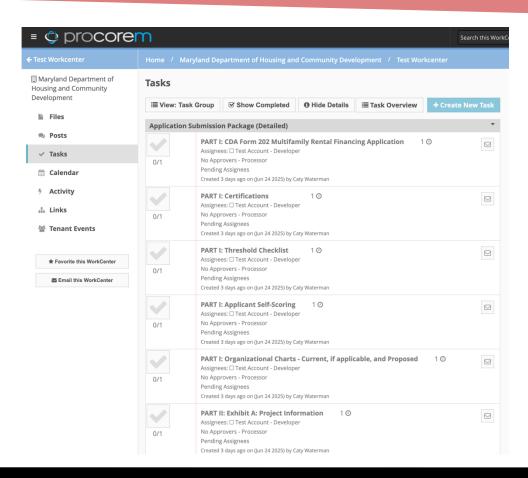
WorkCenter - Uploading Documents

- Click on folder, select upload Files
 - Drag and drop files or choose file button
- Description in description box
- Can add comments
- Click upload when all information has been added
- Each required document must be named and uploaded individually into the correct folder that corresponds to the submission kit



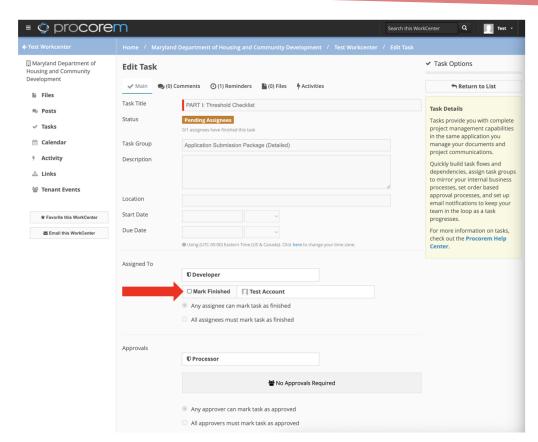
Completing Tasks

- After files have been uploaded, mark the corresponding task as complete
- Tasks correlate to each subfolder of submission package



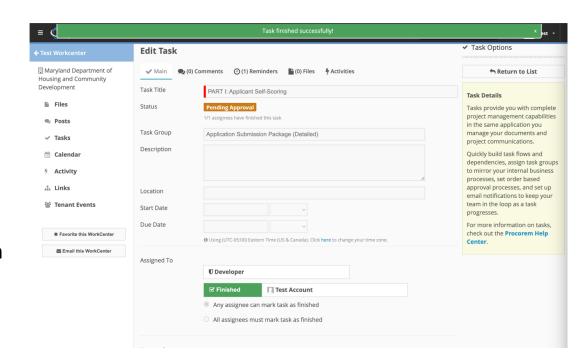
Completing Tasks

- To mark complete, select the task
- Under Assigned To, click on the Mark Finished checkbox. You will get a pop-up message confirming that you are sure you want to finish the task. Select OK.



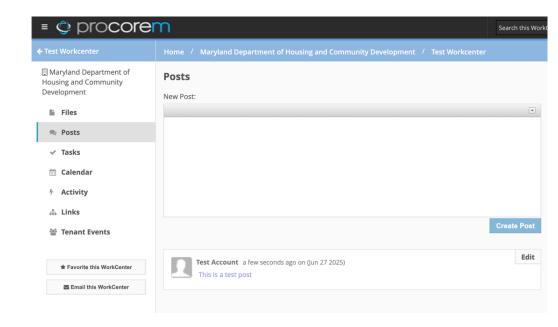
Completing Tasks

- Mark Finished box will change to Finished
- Green banner at top of screen confirming that the task finished successfully
- Do not mark a task as completed until all of the required documents have been submitted
- All tasks must be completed in order to complete your application



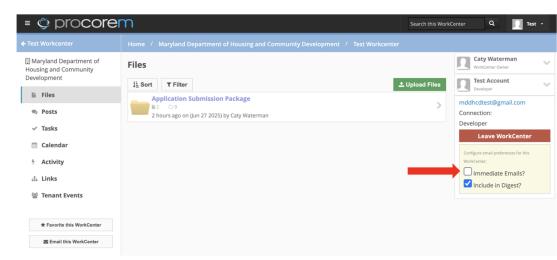
Posts

- Used for communication between CDA and Project Team
- Posts send messages to other WorkCenter members
- Type message in text box and click Create post
 - Will appear in Activity Feed and be notified via email
 - Included in history of all previous posts
- Posts are visible to all WorkCenter members



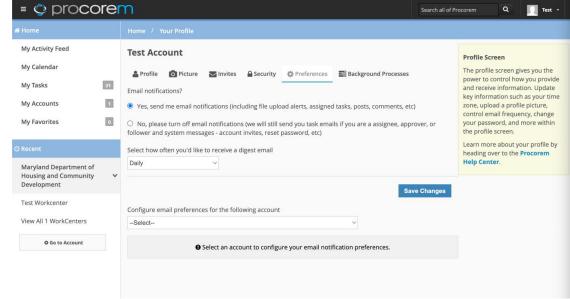
Notifications

- Procorem will send notifications for all activity in the WorkCenter
- If you would like to receive emails as daily or weekly digests, you will need to do so in each WorkCenter
- Can click on your name in the Contributor list and uncheck Immediate Emails
- Can set the frequency of digest emails in your profile by clicking on down arrow by your name in the top right and choosing



Notifications

- If you choose to turn off email notifications, you may miss posts or comments from CDA that could result in processing delays.
- Recommendation: Keep immediate emails or receive email notifications in a daily digest email.



Questions?

Email dhcd.rentalhousing@maryland.gov with any issues

