



Procurement Instructions for UPLIFT

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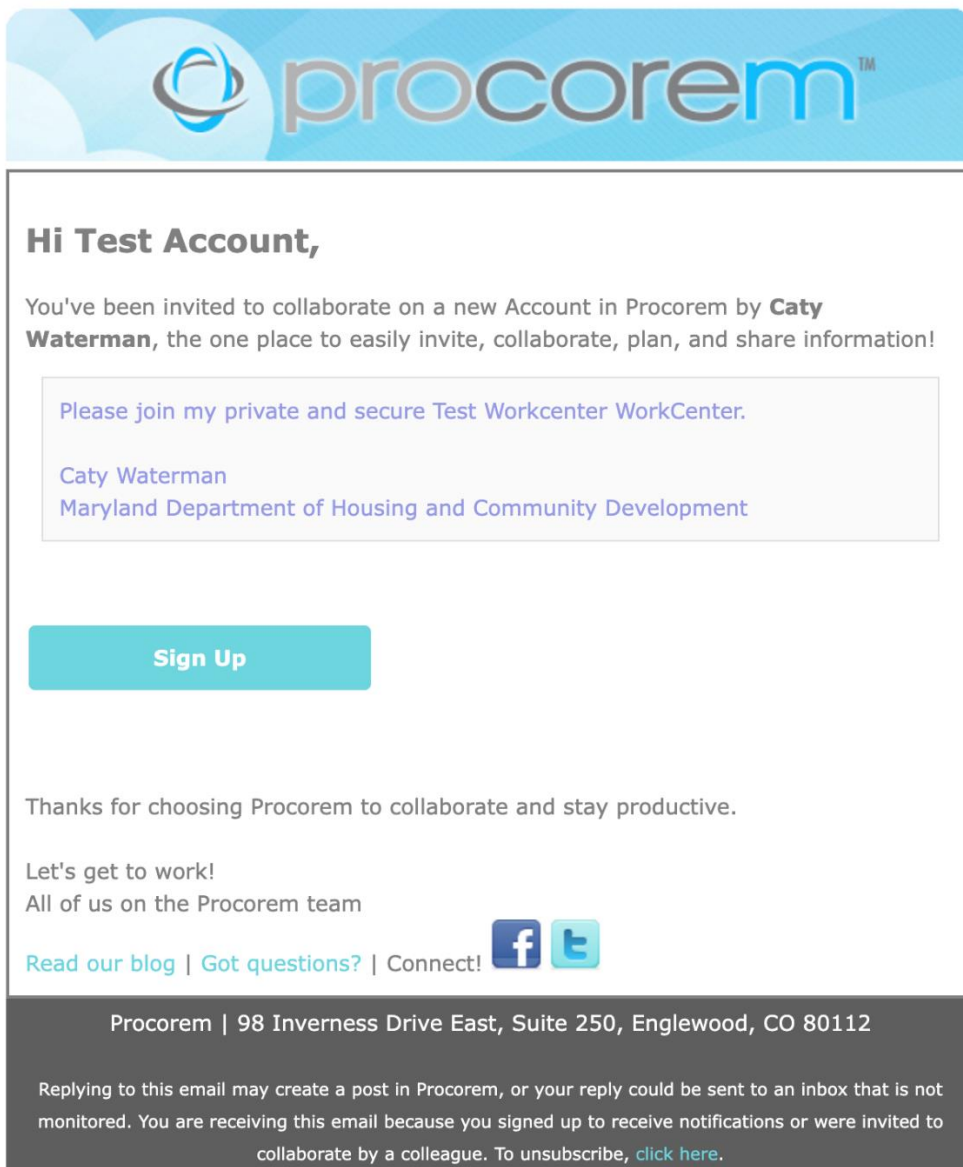
A. Introduction

The Maryland Department of Housing and Community Development is using Procorem as an external file sharing and communication tool that will allow registered users – including project sponsors and developers - to download and upload documents, receive updates, track submissions, and communicate with CDA. With Procorem, we have moved to fully electronic applications and will be able to keep all project documentation and communication in one centralized location.

B. Getting Started

1. Access to Procorem will start by submitting a request for an electronic application folder through our [electronic submission package request](#) form. Once the form has been submitted, we will create a WorkCenter for your project and invite you to join.

When you are first invited to join a Procorem WorkCenter, you will receive an email invitation to create an account. An example of the email is shown below. You will only be asked to create an account one time. Once your account has been created, CDA will be able to add you to other WorkCenters as needed. If you do not receive a WorkCenter invitation within 3 business days of submitting an [electronic submission package request](#), please check your spam or junk folder before emailing uplift.dhcd@maryland.gov.



After you receive the invitation, click on the blue Sign Up button. You will need to create a password, click that you agree to the terms and conditions, and then click on the orange Sign Up Now button.



You've been invited to join Procorem!

Easily collaborate with friends, family, co-workers, and clients

Welcome, Test Account!

Caty Waterman would like you to join their private and secure account, Maryland Department of Housing and Community Development.

As a guest, your access is completely free. Simply fill out the form below to begin working together!

First Name

Test

Last Name

Account

Email

mddhcdtest@gmail.com

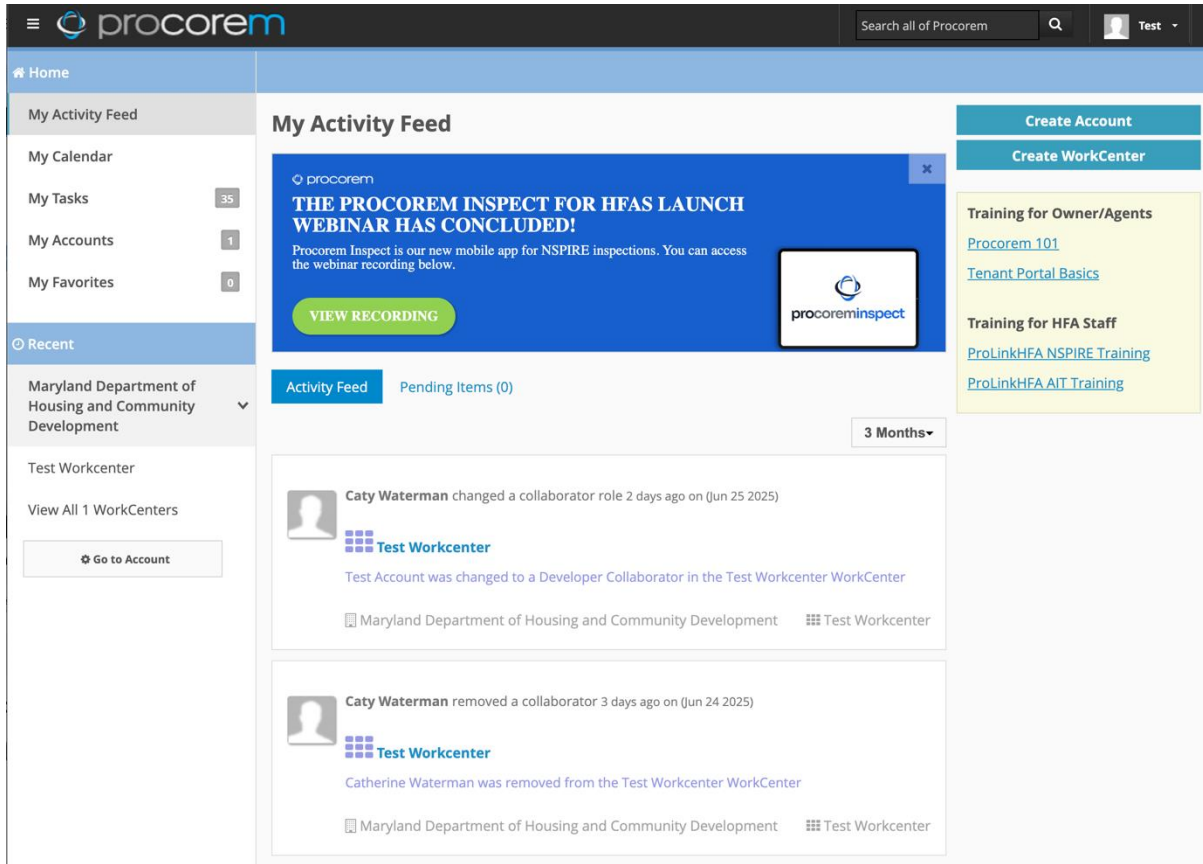
Password

Sign Up Now

I agree to the [terms and conditions](#).

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When you first log in to Procorem you will be taken to your home screen. You will not be in a WorkCenter yet. Any WorkCenters that you have been invited to join will be on the left side under Recent.



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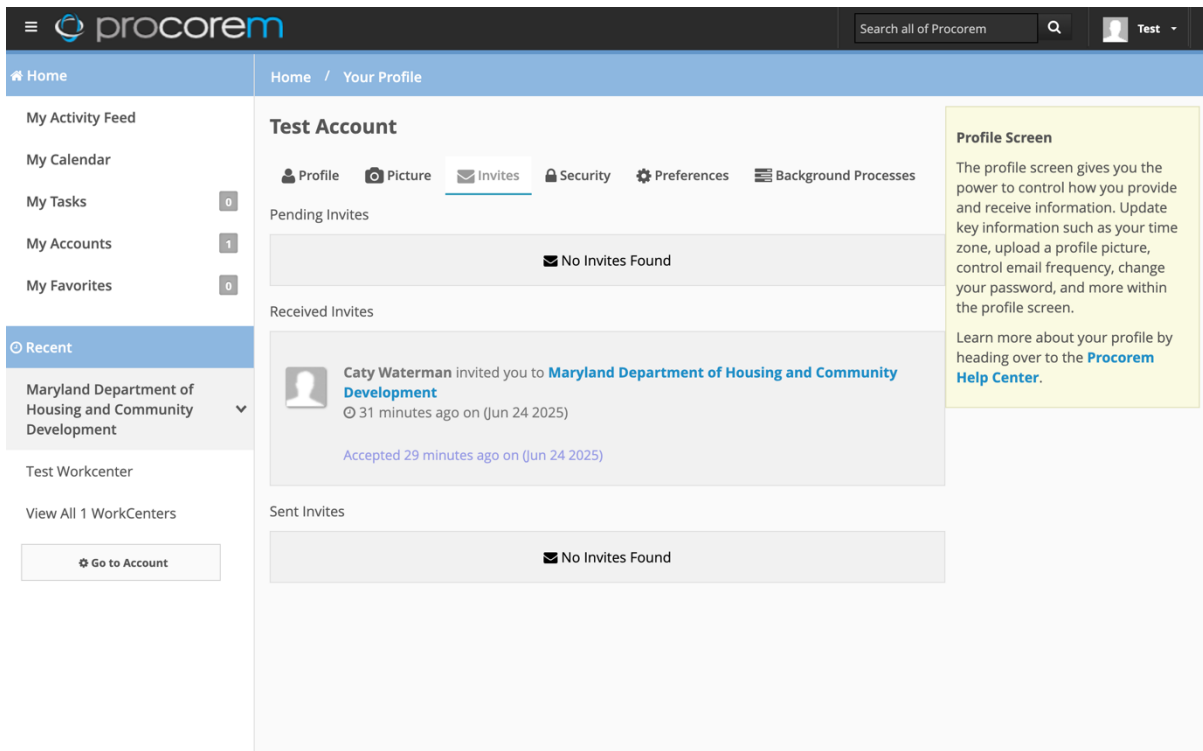
The first time you access Procorem, please update your profile. You will click on the white drop-down arrow by your name in the top right corner and selecting profile. Please complete the fields under the profile section and select Save Changes.

The screenshot shows the Procorem user interface. The top navigation bar includes the Procorem logo, a search bar, and a user profile dropdown labeled 'Test'. The left sidebar contains navigation options: Home, My Activity Feed, My Calendar, My Tasks (0), My Accounts (1), My Favorites (0), Recent (Maryland Department of Housing and Community Development, Test Workcenter, View All 1 WorkCenters), and a Go to Account button. The main content area is titled 'Test Account' and features tabs for Profile, Picture, Invites, Security, Preferences, and Background Processes. The Profile tab is active, displaying form fields for First Name (Test), Last Name (Account), Email (mddhcdtest@gmail.com), Time zone (UTC-05:00 Eastern Time (US & Canada)), Address, City, State, Zip, and Phone 1. A yellow 'Profile Screen' callout box on the right explains that users can control their profile information and provides a link to the Procorem Help Center.

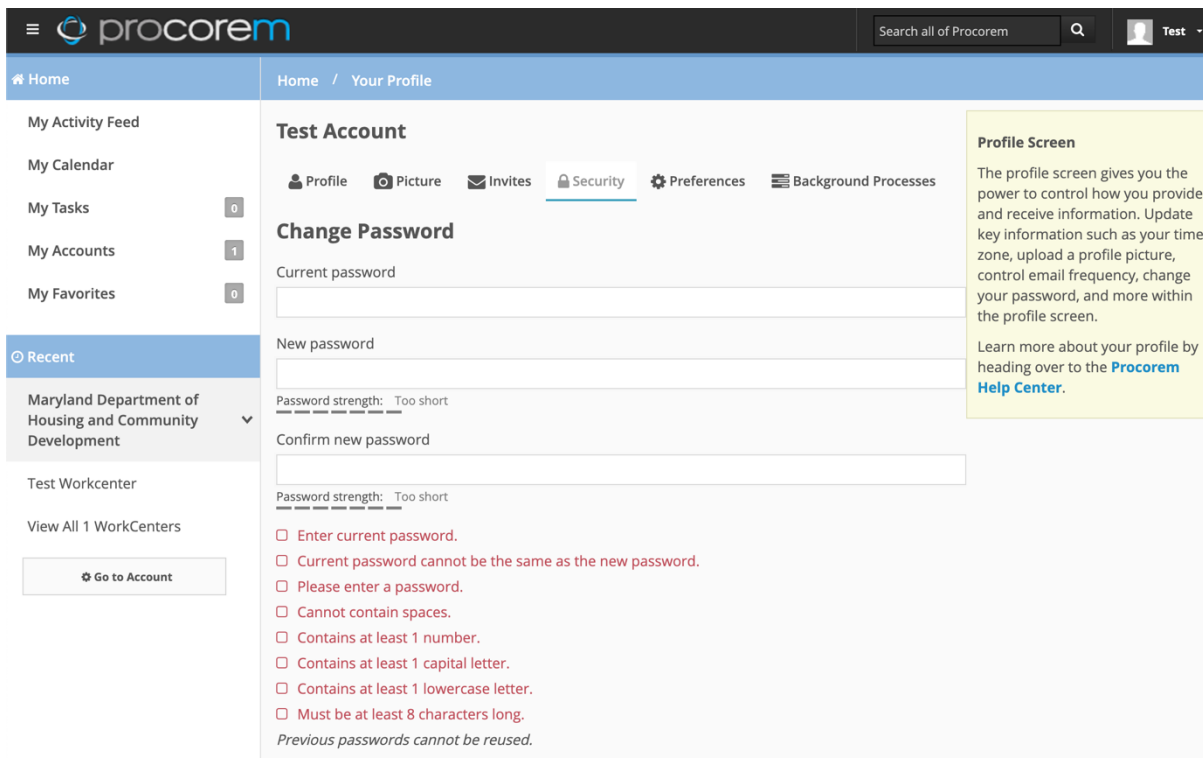
You can also add a profile picture under the picture tab.

This screenshot shows the same Procorem user interface, but with the 'Picture' tab selected. The 'Picture' tab is highlighted, and a placeholder image of a person's silhouette is displayed in the center. Below the placeholder is a blue 'Change Picture' button. The rest of the page, including the sidebar and the 'Profile Screen' callout box, remains the same as in the previous screenshot.

You can view all of the WorkCenters you have been invited to under the Invites tab.



You can reset your password using the Security tab.

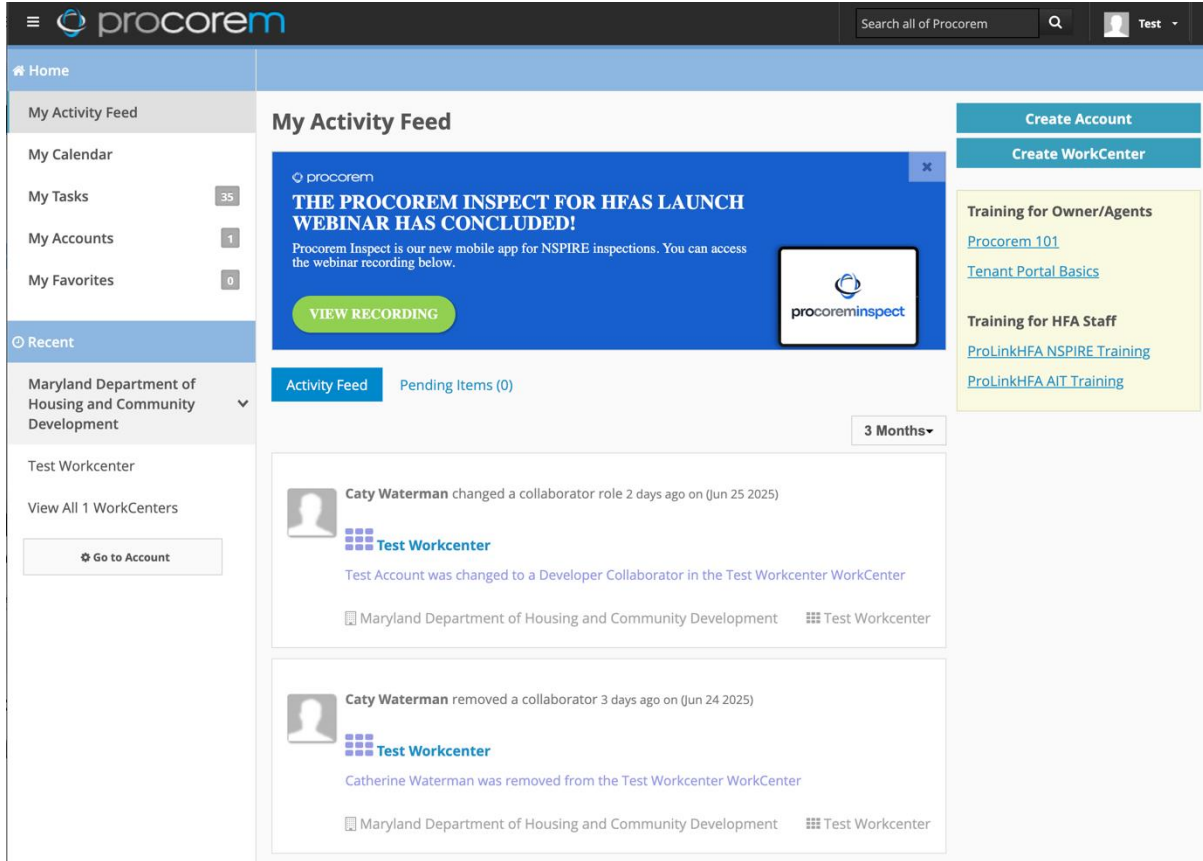


You can change your email preferences under the Preferences tab

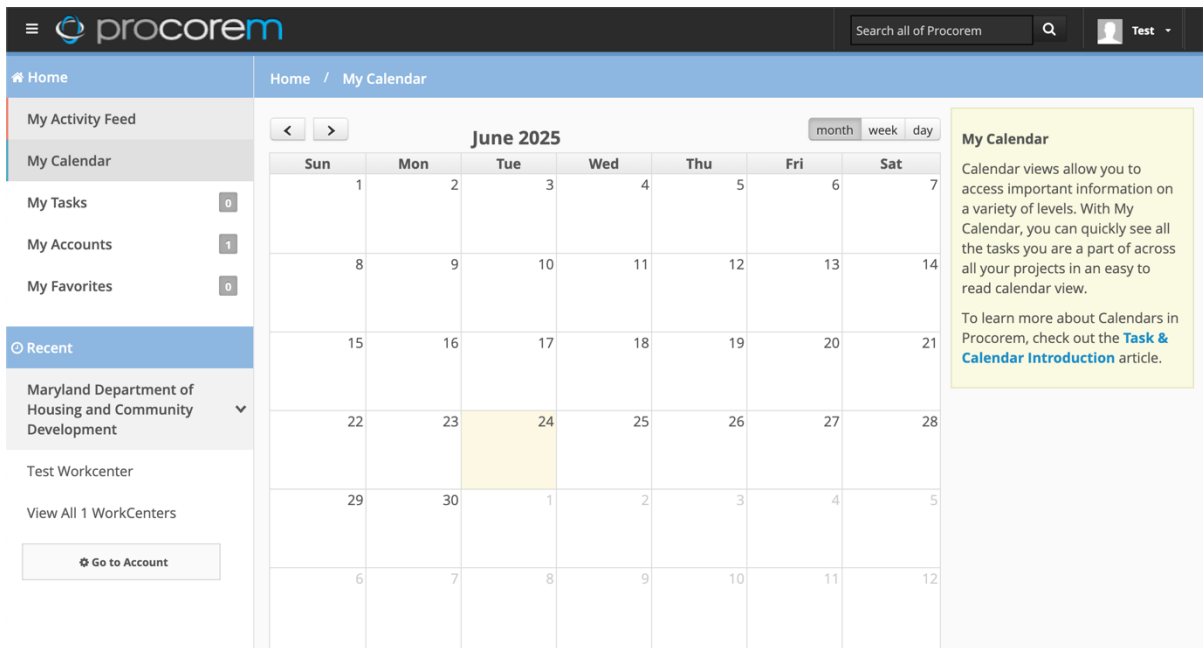
The screenshot displays the Procorem user interface. At the top, there is a search bar and a user profile icon labeled 'Test'. The main navigation menu on the left includes 'Home', 'My Activity Feed', 'My Calendar', 'My Tasks', 'My Accounts', 'My Favorites', 'Recent', and 'Maryland Department of Housing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

C. Home Screen

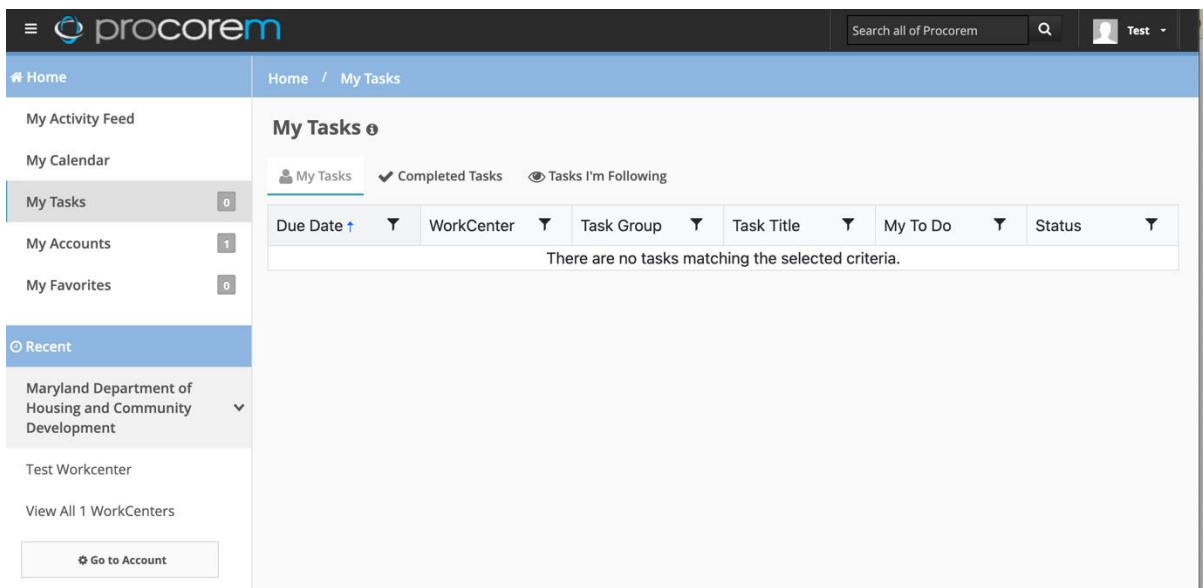
When you log into Procorem, the first thing you will see is My Activity Feed. It shows what has occurred in your WorkCenters, such as files being uploaded or downloaded, when posts have been made, or when tasks have been made or completed.



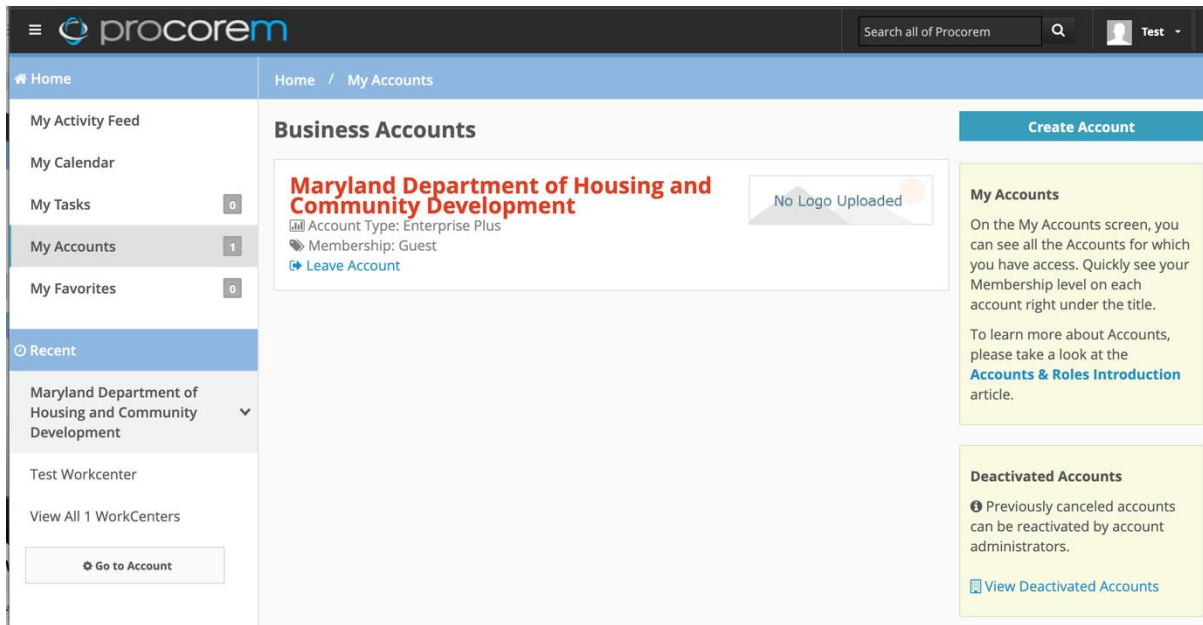
My Calendar will show you the due dates for any tasks that you have been assigned.



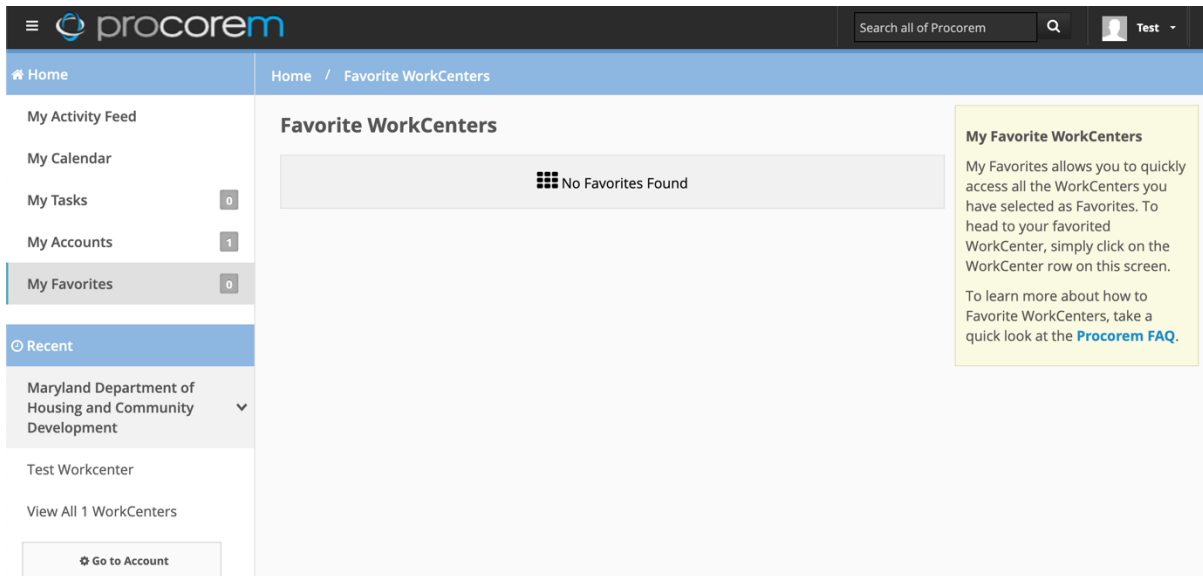
My Tasks will provide you with more information on any assigned tasks.



My Accounts will show you which accounts you are in the Maryland Department of Housing and Community Development Account. If you work with other states that utilize Procorem, you may have other accounts listed under this section.

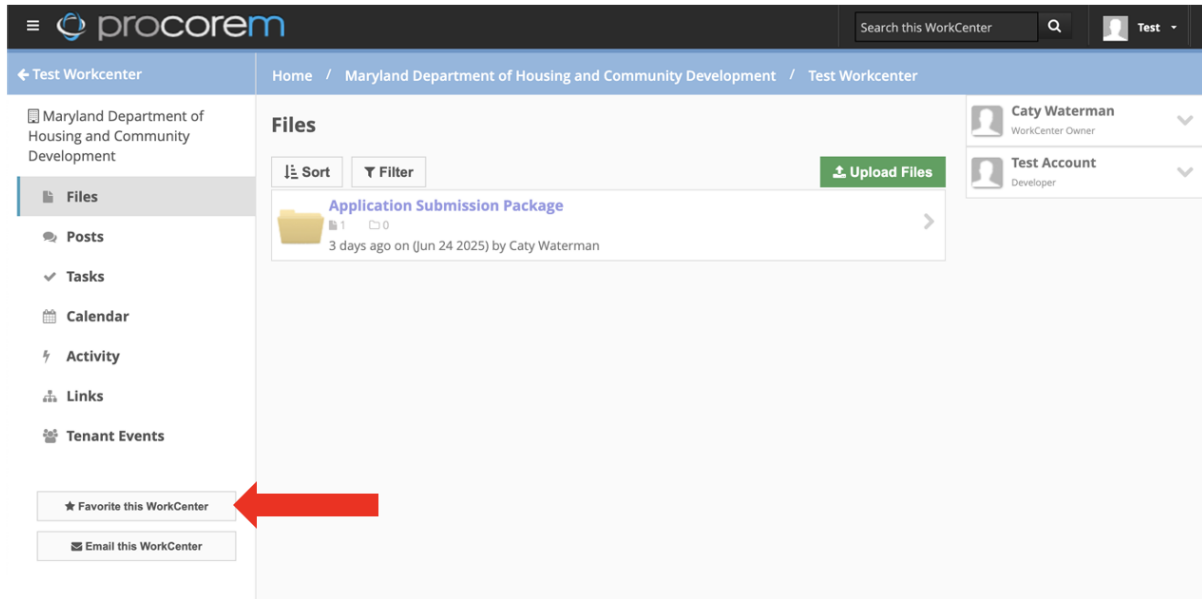


My Favorites will show you any WorkCenters that you have favorited.



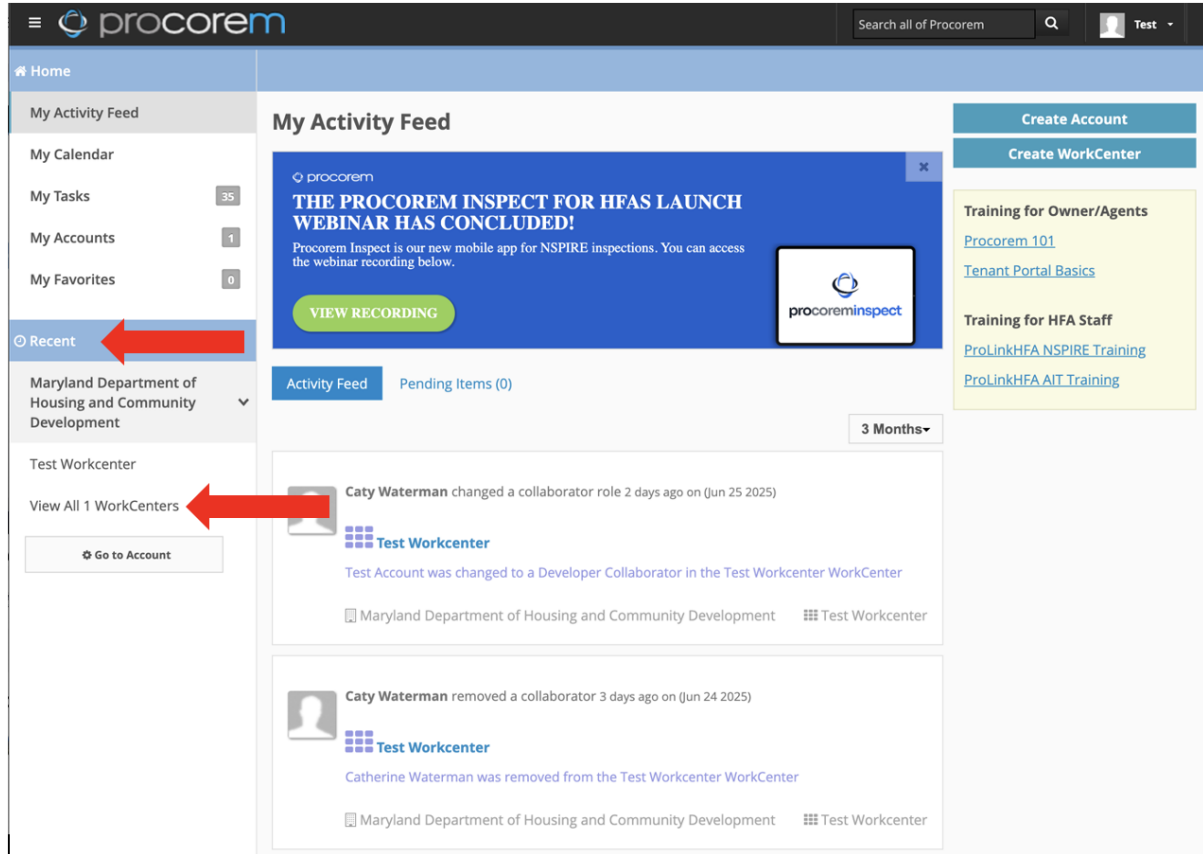
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You can favorite a WorkCenter by selecting a WorkCenter and clicking on Favorite this WorkCenter on the lower left side.



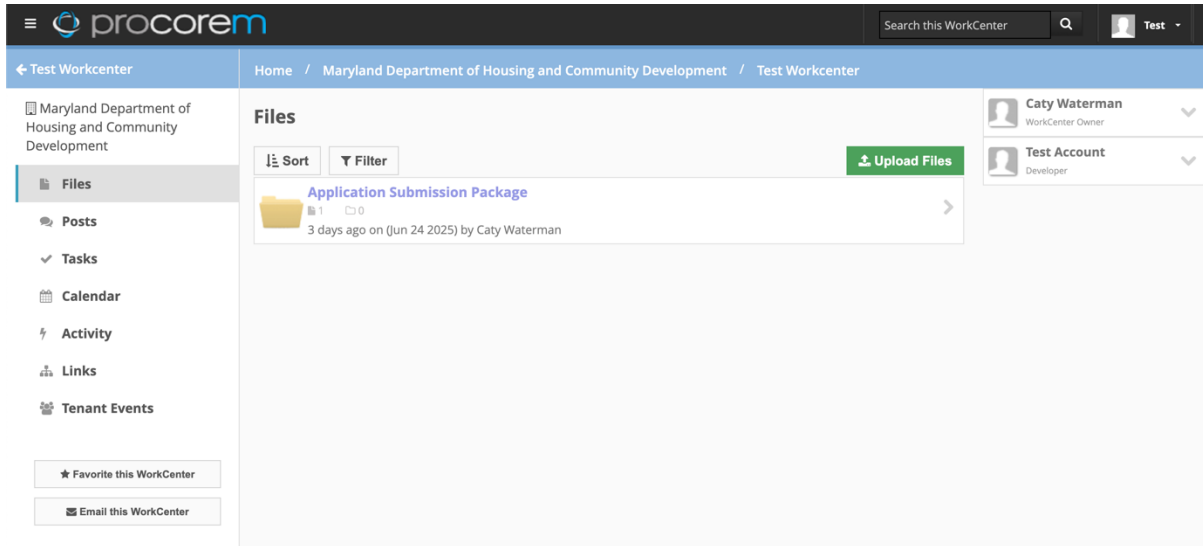
D. Procorem WorkCenters

From your home screen, you will see your recent WorkCenters under the recent section of the left side. If you are on multiple WorkCenters, you may need to click on View All WorkCenters (right above Go to Account button). You can also use the search bar at the top to search the name of the WorkCenter.

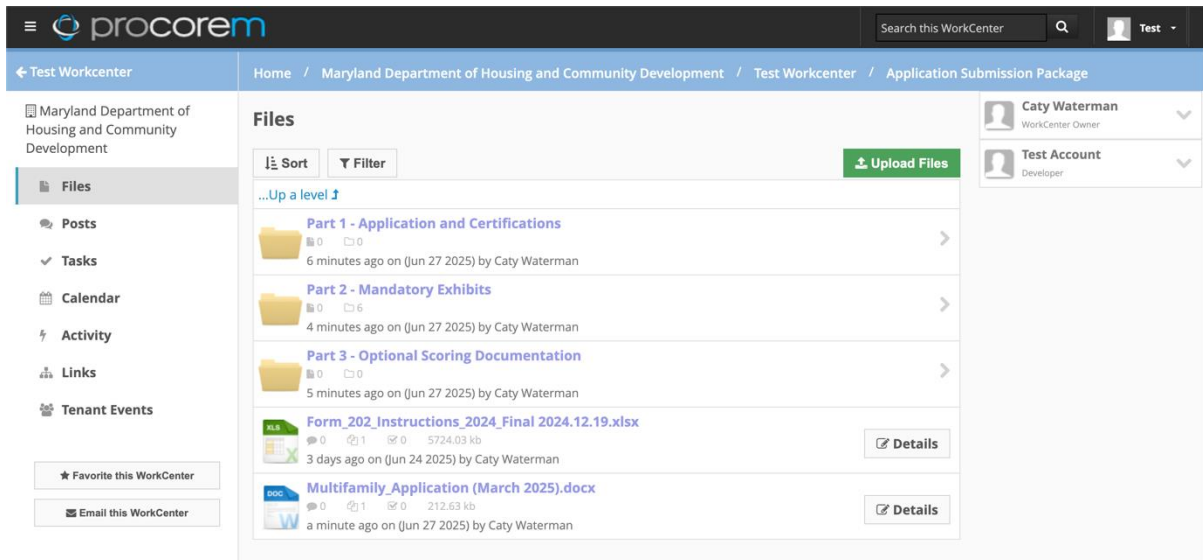


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You will also be able to see all of the users with access to the WorkCenter on the right side. If you need to add additional team members to your WorkCenter, please email uplift.dhcd@maryland.gov and include the name of the WorkCenter, the first and last names of the individual(s) being added, and their email address.



The submission folders are structured to match the elements of the UPLIFT application. You will also find copies of the application materials that you can download directly from the WorkCenter. You can either click on the document title or the details button to download.



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To upload documents, click on the folder and select Upload Files. You can either drag and drop files or use the choose file button to select files from your computer. Include a description in the description box. You can also add comments. They will be included in the email alerts sent to the other members of the WorkCenter. Once all the information has been added, click upload.

Please note that each required document must be named and uploaded individually into the correct folder that corresponds to the submission kit. For example, if all of the documents for Part 1 are uploaded as one large pdf, your application will not be accepted.

procorem

Search this WorkCenter

Test

← Test Workcenter

ousing and Community Development / Test Workcenter / Application Submission Package / Part 1 - Application and Certifications / Upload Files

Maryland Department of Housing and Community Development

Files

Posts

Tasks

Calendar

Activity

Links

★ Favorite this WorkCenter

✉ Email this WorkCenter

Select Files

Drag and drop multiple files

OR

Choose File

Status

--Select--

Type

--Select--

Description

Include a description for all uploaded file(s)

Comment

Comments will be included in email alerts sent to other collaborators.

Cancel Upload

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Once your files have been uploaded, you need to mark the corresponding task as complete. There are tasks that correlates to each subfolder of the submission package.

The screenshot displays the Procorem UPLIFT Application Template interface. On the left is a navigation sidebar with options: Maryland Department of Housing and Community Development, Files, Posts, Tasks (selected), Calendar, Activity, WorkCenter Settings, Links, and Tenant Events. At the bottom of the sidebar are buttons for 'Favorite this WorkCenter' and 'Email this WorkCenter'. The main content area shows a task list under the 'No Group' filter. The tasks are:

- Part 1: Upload Evidence of Fee Payment** (1 task, 1 thumbs up icon). Status: Not Assigned - Developer. Approval from: Clayton McComas - Underwriter. Pending Approval. Created 42 minutes ago on (Apr 30 2026) by Clayton McComas.
- Part 2: Upload Applicant Financials** (1 task, 1 thumbs up icon). Status: Not Assigned - Developer. Approval from: Clayton McComas - Underwriter. Pending Approval. Created 37 minutes ago on (Apr 30 2026) by Clayton McComas.
- Part 3: Upload As-Is and As-Complete Appraisals** (1 task, 1 thumbs up icon). Status: Not Assigned - Developer. Approval from: Clayton McComas - Underwriter. Pending Approval. Created 2 minutes ago on (Apr 30 2026) by Clayton McComas.
- Part 4: Upload Evidence of Public Investment** (1 task, 1 thumbs up icon). Status: Not Assigned - Developer. Approval from: Clayton McComas - Underwriter. Pending Approval. Created 9 minutes ago on (Apr 30 2026) by Clayton McComas.
- Part 4: Upload Evidence of Site Control** (1 task, 1 thumbs up icon). Status: Not Assigned - Developer. Approval from: Clayton McComas - Underwriter. Pending Approval. Created 12 minutes ago on (Apr 30 2026) by Clayton McComas.
- Part 4: Upload Neighborhood Plan** (1 task, 1 thumbs up icon). Status: Not Assigned - Developer. Approval from: Clayton McComas - Underwriter. Pending Approval. Created 24 minutes ago on (Apr 30 2026) by Clayton McComas.
- Part 4: Upload Project Area/Site Location Map** (1 task, 1 thumbs up icon). Status: Not Assigned - Developer.

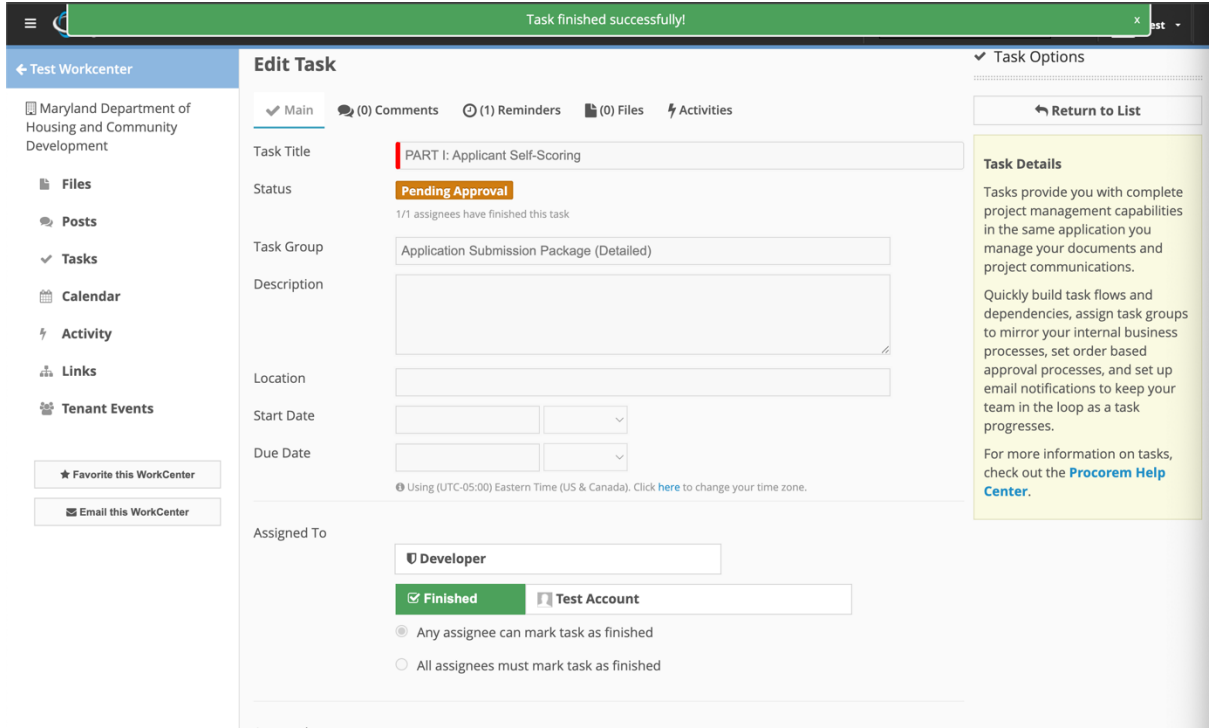
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To mark a task as complete, select the task. Under Assigned to you will click on the Mark Finished check box. You will get a pop-up message confirming that you are sure you want to finish the task. Select OK.

The screenshot displays the Procorem 'Edit Task' interface. The breadcrumb navigation shows the path: Home / Maryland Department of Housing and Community Development / Test Workcenter / Edit Task. The task title is 'PART I: Threshold Checklist' and its status is 'Pending Assignees'. The task group is 'Application Submission Package (Detailed)'. The 'Assigned To' section shows the task is assigned to 'Developer' and includes a 'Mark Finished' checkbox, which is highlighted by a red arrow. Below this, there are radio button options for 'Any assignee can mark task as finished' (selected) and 'All assignees must mark task as finished'. The 'Approvals' section shows the task is assigned to 'Processor' and includes a 'No Approvals Required' button. The right sidebar contains 'Task Options' and 'Task Details' information.

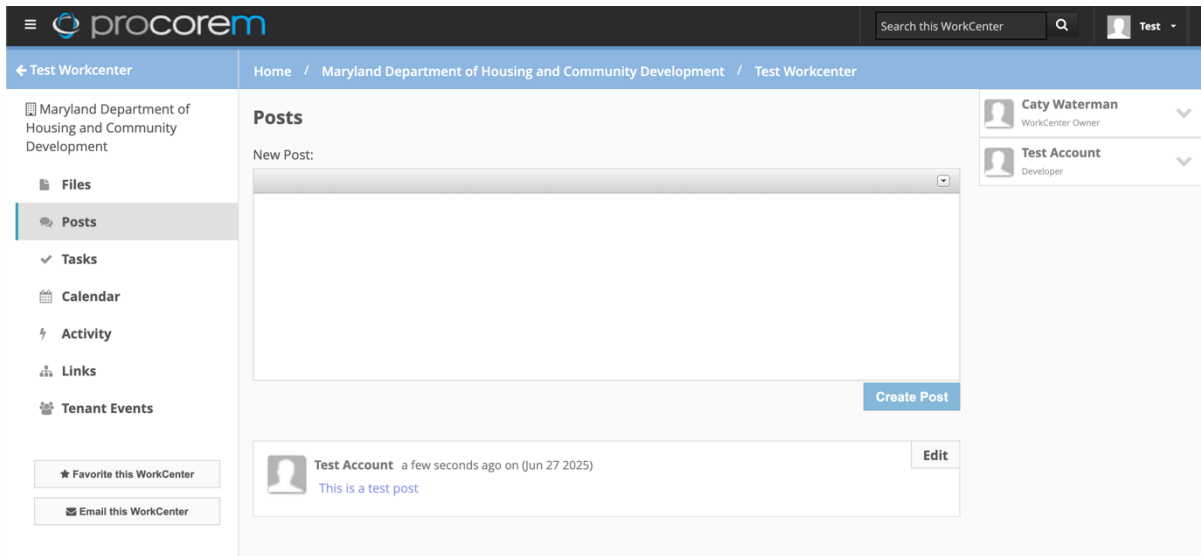
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The Mark Finished box will change to Finished and there should be a green banner at the top of the screen confirming that the task finished successfully. You should not mark a task as completed until all of the required documents have been submitted. All tasks must be completed in order to complete your application.

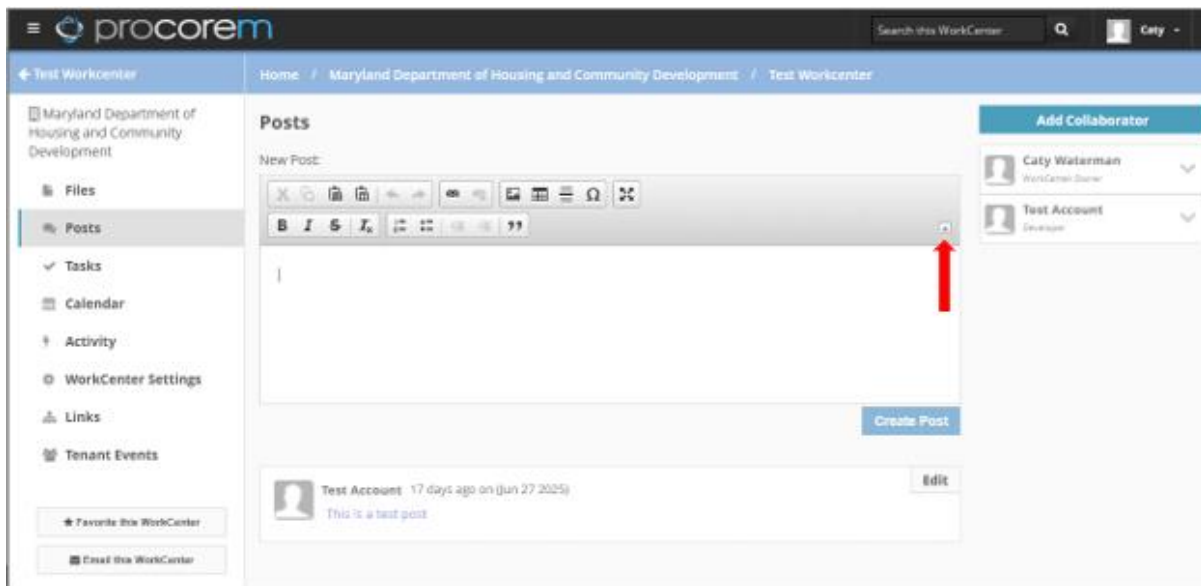


E. Posts

In addition to uploading or downloading files and completing tasks, Procorem can also be used for communication between CDA and the project team. The Post feature will allow you to send messages to the other WorkCenter members by typing your message in the text box and clicking Create Post. They will show in your activity feed and be sent via email. You will also be able to see the history of all previously sent posts. Please note that posts are visible to all members of the WorkCenter, so you will need to state the intended recipients name in the post to avoid confusion.

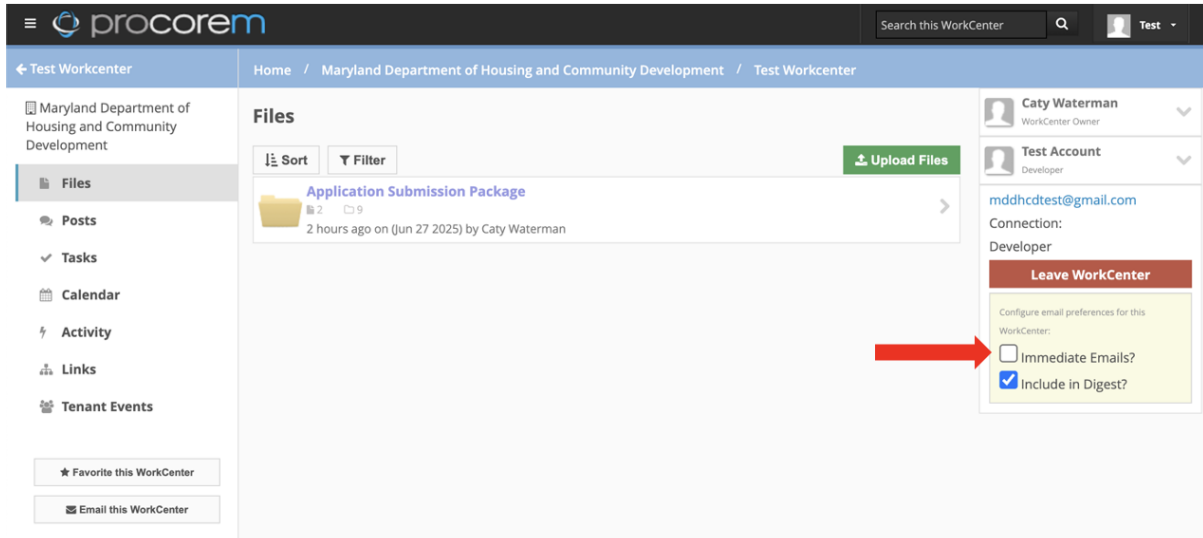


You can click on the arrow on the right side of the gray bar at the top of the post to access formatting toolbar.



F. 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 that you are a part of. You can click on your name in the Contributor list and uncheck Immediate Emails. You can set the frequency of digest emails in your profile by clicking on down arrow by your name in the top right and choosing preferences.



If you choose to turn off email notifications, you may miss posts or comments from CDA that could result in processing delays. We encourage you to receive email notifications in a daily digest email.

