



CDA Procorem Instructions

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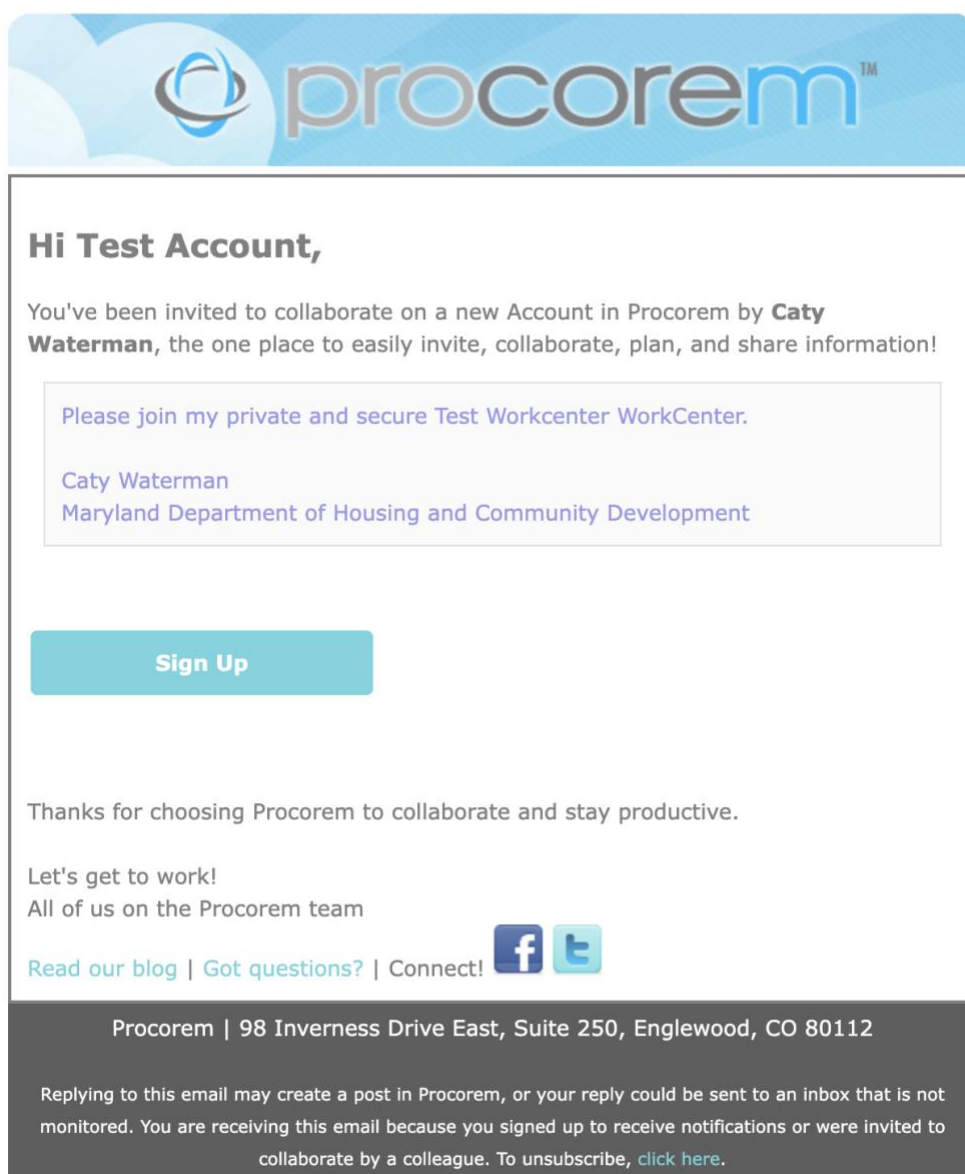
A. Introduction

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 will be able to move into fully electronic applications, including the Competitive Funding Round, 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](#), you may want to check your spam or junk folder before emailing dhcd.rentalhousing@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.

The screenshot displays the Procorem web application interface. At the top, a dark header bar contains the Procorem logo, a search bar with the text "Search all of Procorem", and a user profile icon labeled "Test". Below the header, a left-hand navigation menu is visible, featuring sections for "Home" (with a star icon) and "Recent" (with a magnifying glass icon). The "Home" section includes links to "My Activity Feed", "My Calendar", "My Tasks" (with a count of 35), "My Accounts" (with a count of 1), and "My Favorites" (with a count of 0). The "Recent" section lists "Maryland Department of Housing and Community Development" with a dropdown arrow, "Test Workcenter", and "View All 1 WorkCenters". A "Go to Account" button is located at the bottom of the menu. The main content area is titled "My Activity Feed" and features a large blue banner for "THE PROCOREM INSPECT FOR HFAS LAUNCH WEBINAR HAS CONCLUDED!". Below the banner, there is a "VIEW RECORDING" button and a "procoreminspect" logo. To the right of the banner, there are buttons for "Create Account" and "Create WorkCenter", and a list of training links: "Training for Owner/Agents" (with links to "Procorem 101" and "Tenant Portal Basics") and "Training for HFA Staff" (with links to "ProLinkHFA NSPIRE Training" and "ProLinkHFA AIT Training"). Below the banner, there is a tab for "Activity Feed" and a "Pending Items (0)" indicator. A "3 Months" filter is also present. The activity feed shows two entries: one where "Cathy Waterman" changed a collaborator role 2 days ago (Jun 25 2025) in the "Test Workcenter", and another where "Cathy Waterman" removed a collaborator 3 days ago (Jun 24 2025) from the "Test Workcenter". Both entries include a "Test Workcenter" logo and a link to "View All 1 WorkCenters".

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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 web application interface. The top navigation bar includes the Procorem logo, a search bar, and a user profile dropdown labeled 'Test'. The left sidebar contains navigation links: 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 'Profile Screen' sidebar on the right explains the purpose of the profile screen and provides a link to the Procorem Help Center.

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

The screenshot shows the Procorem web application interface with the 'Picture' tab selected. The main content area displays a placeholder for a profile picture and a 'Change Picture' button. The 'Profile Screen' sidebar on the right remains visible, providing information about the profile screen and a link to the Procorem Help Center.

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

The screenshot shows the Procorem web application interface. The top navigation bar includes the Procorem logo, a search bar, and a user profile dropdown labeled 'Test'. The left sidebar contains navigation links: Home, My Activity Feed, My Calendar, My Tasks (0), My Accounts (1), My Favorites (0), Recent (highlighted), Maryland Department of Housing and Community Development (dropdown), 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 has tabs for Profile, Picture, Invites (selected), Security, Preferences, and Background Processes. The 'Invites' tab shows 'Pending Invites' (No Invites Found) and 'Received Invites'. A received invite from 'Cathy Waterman' to 'Maryland Department of Housing and Community Development' is shown, dated '31 minutes ago on (Jun 24 2025)', with an 'Accepted 29 minutes ago on (Jun 24 2025)' status. 'Sent Invites' also shows 'No Invites Found'. A 'Profile Screen' sidebar on the right explains the profile screen's functionality and provides a link to the Procorem Help Center.

You can reset your password using the Security tab.

The screenshot shows the Procorem web application interface with the 'Security' tab selected. The main content area is titled 'Change Password'. It contains fields for 'Current password', 'New password', and 'Confirm new password'. Below these fields, the 'Password strength' is indicated as 'Too short' with a progress bar. A list of password requirements is shown with checkboxes: '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 states 'Previous passwords cannot be reused.'. The 'Profile Screen' sidebar on the right remains visible, providing information about the profile screen and a link to the Procorem Help Center.

You can change your email preferences under the Preferences tab.

The screenshot displays the Procorem user interface for a 'Test Account'. The top navigation bar includes the Procorem logo, a search bar, and a user profile icon labeled 'Test'. The left sidebar contains a 'Recent' section with a dropdown menu showing 'Maryland Department of Housing and Community Development'. The main content area is titled 'Test Account' and features a tabbed interface with 'Profile', 'Picture', 'Invites', 'Security', 'Preferences' (selected), and 'Background Processes'. Under the 'Preferences' tab, there are sections for 'Email notifications?' and 'Select how often you'd like to receive a digest email'. The 'Email notifications?' section has two radio button options: 'Yes, send me email notifications...' (selected) and 'No, please turn off email notifications...'. The 'Digest email' section has a dropdown menu set to 'Daily'. A 'Save Changes' button is located below these settings. At the bottom, there is a section for configuring email preferences for a specific account, with a dropdown menu currently showing '--Select--'. A message at the bottom of this section states: 'Select an account to configure your email notification preferences.' On the right side of the main content area, there is a 'Profile Screen' sidebar with explanatory text about the profile settings 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.

The screenshot displays the Procorem Home Screen. The top navigation bar includes the Procorem logo, a search bar, and a user profile icon labeled 'Test'. The left sidebar contains navigation links: Home, My Activity Feed, My Calendar, My Tasks (35), 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 'My Activity Feed' and features a large blue banner for 'THE PROCOREM INSPECT FOR HFAS LAUNCH WEBINAR HAS CONCLUDED!'. Below the banner, there are tabs for 'Activity Feed' and 'Pending Items (0)', and a '3 Months' filter. The activity feed shows two entries by 'Cathy Waterman' from 'Test Workcenter': one where a collaborator role was changed on June 25, 2025, and another where a collaborator was removed on June 24, 2025. On the right, there are buttons for 'Create Account' and 'Create WorkCenter', and a section for training resources including 'Training for Owner/Agents', 'Procorem 101', 'Tenant Portal Basics', 'Training for HFA Staff', 'ProLinkHFA NSPIRE Training', and 'ProLinkHFA AIT Training'.

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

The screenshot shows the Procorem 'My Calendar' page. The left sidebar contains navigation links: Home, My Activity Feed, My Calendar (selected), My Tasks (0), My Accounts (1), My Favorites (0), Recent, Maryland Department of Housing and Community Development (dropdown), Test Workcenter, View All 1 WorkCenters, and a Go to Account button. The main content area displays a calendar for June 2025. The calendar grid shows dates from 1 to 30. The date 24 is highlighted in yellow. A 'My Calendar' sidebar on the right explains that calendar views allow users to access important information on a variety of levels and provides a link to the 'Task & Calendar Introduction' article. The top navigation bar includes the Procorem logo, a search bar, and a user profile icon labeled 'Test'.

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

The screenshot shows the Procorem 'My Tasks' page. The left sidebar is identical to the previous screenshot. The main content area displays the 'My Tasks' section. It includes tabs for 'My Tasks' (selected), 'Completed Tasks', and 'Tasks I'm Following'. Below the tabs is a table with columns: Due Date (with an upward arrow), WorkCenter, Task Group, Task Title, My To Do, and Status. The table is currently empty, and a message states: 'There are no tasks matching the selected criteria.' The top navigation bar is also identical to the previous screenshot.

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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.

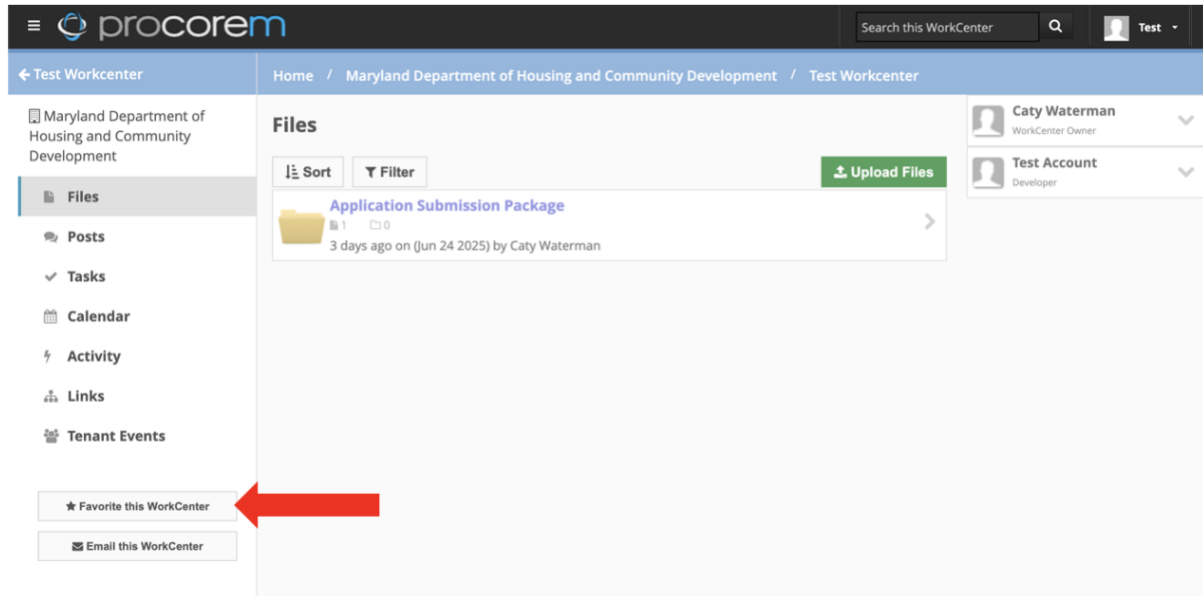
The screenshot shows the Procorem 'My Accounts' page. The left sidebar contains navigation links: Home, My Activity Feed, My Calendar, My Tasks (0), My Accounts (1), My Favorites (0), Recent, Maryland Department of Housing and Community Development, Test Workcenter, and View All 1 WorkCenters. A 'Go to Account' button is at the bottom. The main content area is titled 'Business Accounts' and features a card for the 'Maryland Department of Housing and Community Development' account. This card shows 'Account Type: Enterprise Plus' and 'Membership: Guest', with a 'Leave Account' link. A 'No Logo Uploaded' placeholder is also visible. On the right, there is a 'Create Account' button and two informational boxes: 'My Accounts' explaining the page's function and 'Deactivated Accounts' with a link to 'View Deactivated Accounts'.

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

The screenshot shows the Procorem 'My Favorites' page. The left sidebar is identical to the previous screenshot, but 'My Favorites' is now selected, showing a count of 0. The main content area is titled 'Favorite WorkCenters' and displays a message: 'No Favorites Found'. On the right, a box titled 'My Favorite WorkCenters' explains that users can quickly access their selected WorkCenters by clicking on the WorkCenter row on this screen. It also includes a link to the 'Procorem FAQ' for more information.

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



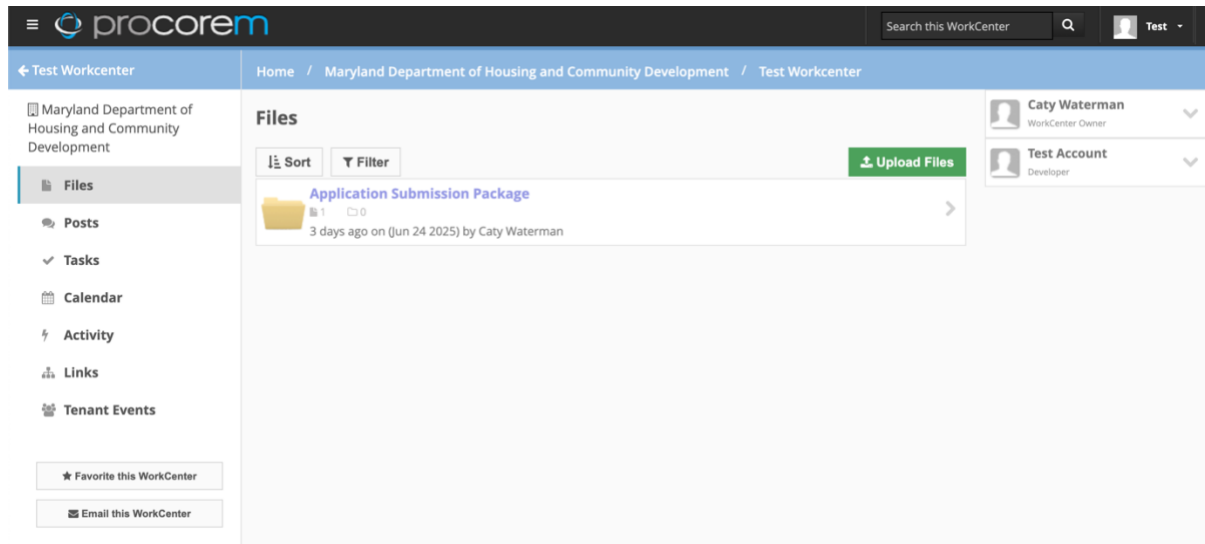
D. Procorem WorkCenters

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.

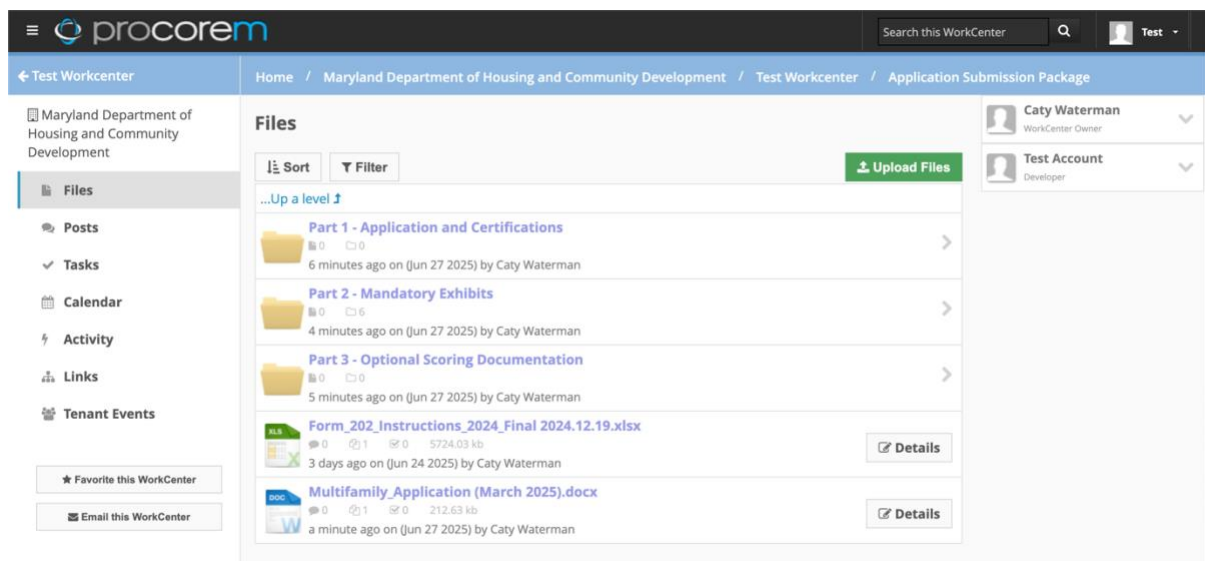
The screenshot displays the Procorem web application interface. On the left sidebar, the 'Recent' section is highlighted with a red arrow. Below it, the 'View All 1 WorkCenters' button is also indicated by a red arrow. The main content area shows the 'My Activity Feed' with a banner for 'THE PROCOREM INSPECT FOR HFAS LAUNCH WEBINAR HAS CONCLUDED!'. Below the banner, there are two activity items: 'Caty Waterman changed a collaborator role 2 days ago on (Jun 25 2025)' and 'Caty Waterman removed a collaborator 3 days ago on (Jun 24 2025)'. The right sidebar contains links for 'Create Account', 'Create WorkCenter', and training resources for Owner/Agents and HFA Staff.

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Depending on the stage of your project, you will have different folder structures, like Application Submission, Viability Submission, Commitment Submission, or Combined Viability/Commitment Submission. 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 dhcd.rentalhousing@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 submission kits posted on our website. 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. It is important that you download and use the version of the CDA Form 202 saved in your WorkCenter to allow DHCD to transfer the information into our database.



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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 Exhibit A 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 is a task that correlates to each subfolder of the submission package.

The screenshot displays the Procorem Test Workcenter interface. The top navigation bar includes the Procorem logo, a search bar, and a user profile dropdown for 'Test'. The left sidebar shows a navigation menu with options: Files, Posts, Tasks (selected), Calendar, Activity, Links, and Tenant Events. Below the menu are buttons for 'Favorite this WorkCenter' and 'Email this WorkCenter'. The main content area is titled 'Tasks' and shows a list of tasks under the heading 'Application Submission Package (Detailed)'. The tasks are as follows:

Task Name	Status	Assignees	Approvers	Pending Assignees	Created By
PART I: CDA Form 202 Multifamily Rental Financing Application	0/1	Test Account - Developer	No Approvers - Processor	Pending Assignees	Caty Waterman
PART I: Certifications	0/1	Test Account - Developer	No Approvers - Processor	Pending Assignees	Caty Waterman
PART I: Threshold Checklist	0/1	Test Account - Developer	No Approvers - Processor	Pending Assignees	Caty Waterman
PART I: Applicant Self-Scoring	0/1	Test Account - Developer	No Approvers - Processor	Pending Assignees	Caty Waterman
PART I: Organizational Charts - Current, if applicable, and Proposed	0/1	Test Account - Developer	No Approvers - Processor	Pending Assignees	Caty Waterman
PART II: Exhibit A: Project Information	0/1	Test Account - Developer	No Approvers - Processor	Pending Assignees	Caty Waterman

Each task entry includes a checkbox, a progress indicator (0/1), and a '1' icon. The right sidebar shows the user profile for 'Caty Waterman' (WorkCenter Owner) and 'Test Account' (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 left sidebar contains navigation links for Files, Posts, Tasks, Calendar, Activity, Links, and Tenant Events. The main content area is titled 'Edit Task' and includes tabs for Main, Comments, Reminders, Files, and Activities. The task details show a title 'PART I: Threshold Checklist', a status 'Pending Assignees', and a task group 'Application Submission Package (Detailed)'. The 'Assigned To' section shows a dropdown menu with 'Developer' selected, and a red arrow points to the 'Mark Finished' checkbox. Below this, there are radio buttons for 'Any assignee can mark task as finished' (selected) and 'All assignees must mark task as finished'. The 'Approvals' section shows a dropdown menu with 'Processor' selected, and a button for 'No Approvals Required'. The right sidebar, titled 'Task Options', contains a 'Return to List' button and a 'Task Details' section with explanatory text about task management.

Task Options

[Return to List](#)

Task Details

Tasks provide you with complete project management capabilities in the same application you manage your documents and project communications.

Quickly build task flows and dependencies, assign task groups to mirror your internal business processes, set order based approval processes, and set up email notifications to keep your team in the loop as a task progresses.

For more information on tasks, check out the [Procorem Help Center](#).

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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.

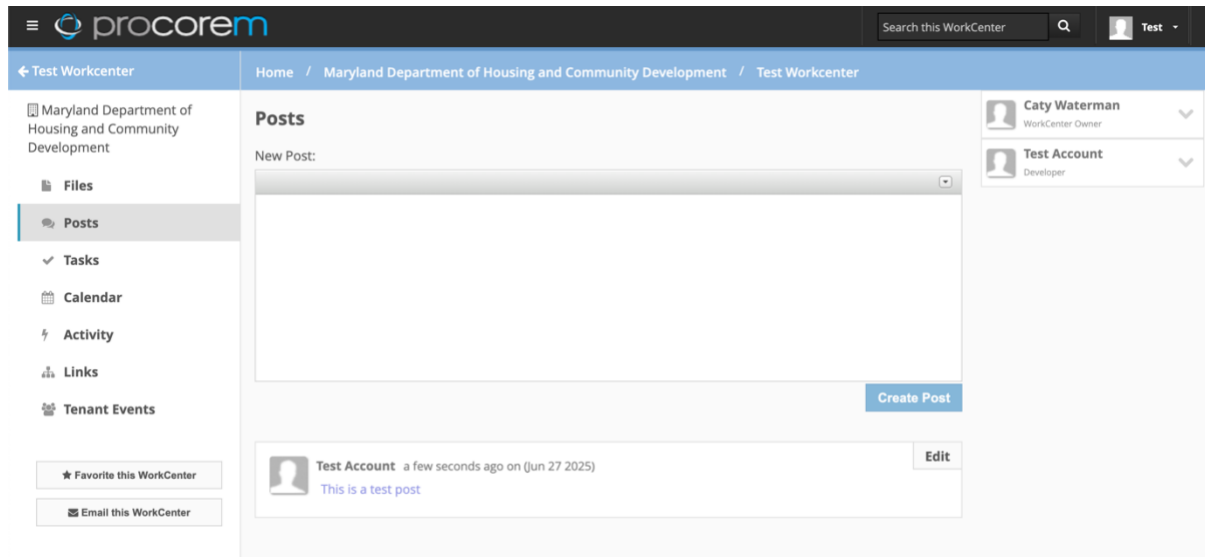
The screenshot displays the 'Edit Task' interface within the Maryland Department of Housing and Community Development's system. At the top, a green banner confirms 'Task finished successfully!'. The left sidebar shows navigation options: Test Workcenter, Maryland Department of Housing and Community Development, Files, Posts, Tasks (selected), Calendar, Activity, Links, and Tenant Events. The main content area is titled 'Edit Task' and includes tabs for Main, Comments (0), Reminders (1), Files (0), and Activities. The task details are as follows:

- Task Title:** PART I: Applicant Self-Scoring
- Status:** Pending Approval (1/1 assignees have finished this task)
- Task Group:** Application Submission Package (Detailed)
- Description:** (Empty text area)
- Location:** (Empty text area)
- Start Date:** (Empty date field)
- Due Date:** (Empty date field)
- Assigned To:** Developer, Test Account
- Mark Finished:** (Green button with checkmark)
- Options:** Any assignee can mark task as finished (selected), All assignees must mark task as finished

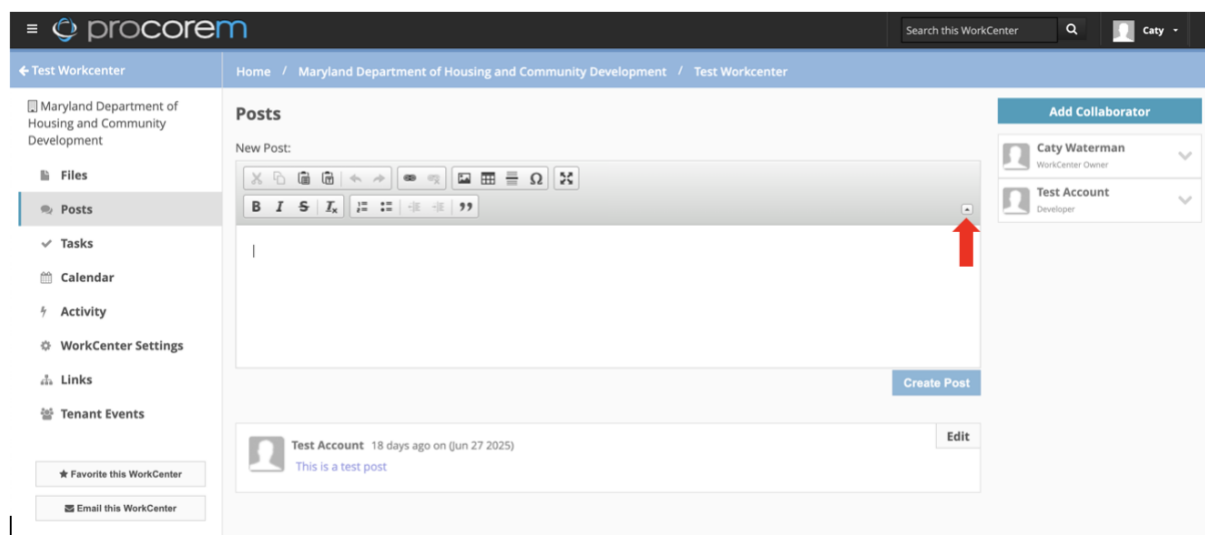
On the right, the 'Task Options' section includes a 'Return to List' button and a 'Task Details' box explaining the task management capabilities and providing a link to the Procore Help Center.

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.

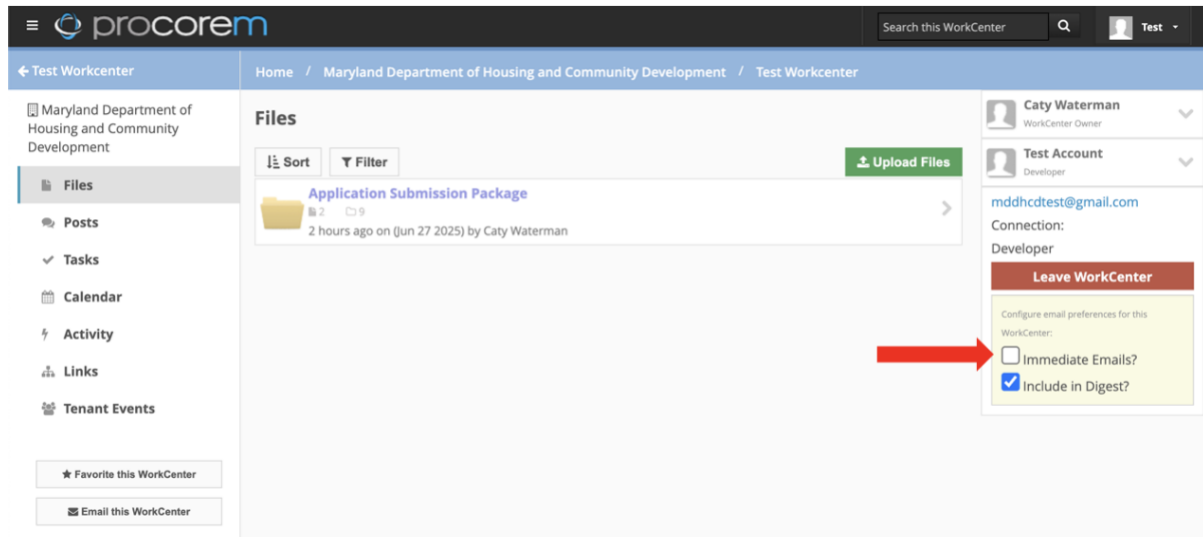


You can click on the arrow on the right side of the gray bar at the top of the post to access formatting toolbar.



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.

