



Introduction to Procorem

January 21, 2026, 10am HST



Ryan Kim
VP of Professional Services
ProLink Solutions



Tom Dang
Senior Solutions Consultant
ProLink Solutions



Sara Surprenant
Customer Success Rep/Trainer
ProLink Solutions



Presentation Agenda

- 01** Introduction to Procorem
- 02** Invitation to Procorem
- 03** Accessing the WorkCenter
- 04** Help Center for Procorem

01 Introduction to Procorem

Introduction to Procorem

- ▶ Procorem is the first collaborative portal built for developers, state and local housing agencies, lenders, syndicators, and investors.
- ▶ Procorem provides transparent communication for applications, pipelines, asset management, and reporting.
- ▶ Procorem allows for easy setup of secure WorkCenters for project collaboration, both within your organization and with external partners and clients.



Procorem Hierarchy



Procorem is **HHFDC**'s external-facing, front-office portal where information such as templates are published, and where **HHFDC**'s external customers/partners, such as developers or property managers, submit completed applications or compliance data to the **HHFDC**.

Features include:

- Private, invite-only WorkCenters to centralize and store proposal information
- File sharing, versioning, and collaboration
- Encrypted file and folder infrastructure
- Enterprise task and project management
- Time-stamping and complete audit history of all user activity
- Ability to save comments on files, tasks, and WorkCenters
- Mobile enabled, responsive design
- Uses HTTPS protocol and secured with the latest TLS encryption methods

Supported Web Browsers

Procorem requires an up-to-date web browser to make sure that you can use all of Procorem's features.

Procorem currently supports the latest two versions of all browsers, unless otherwise noted.

Supported browsers include:

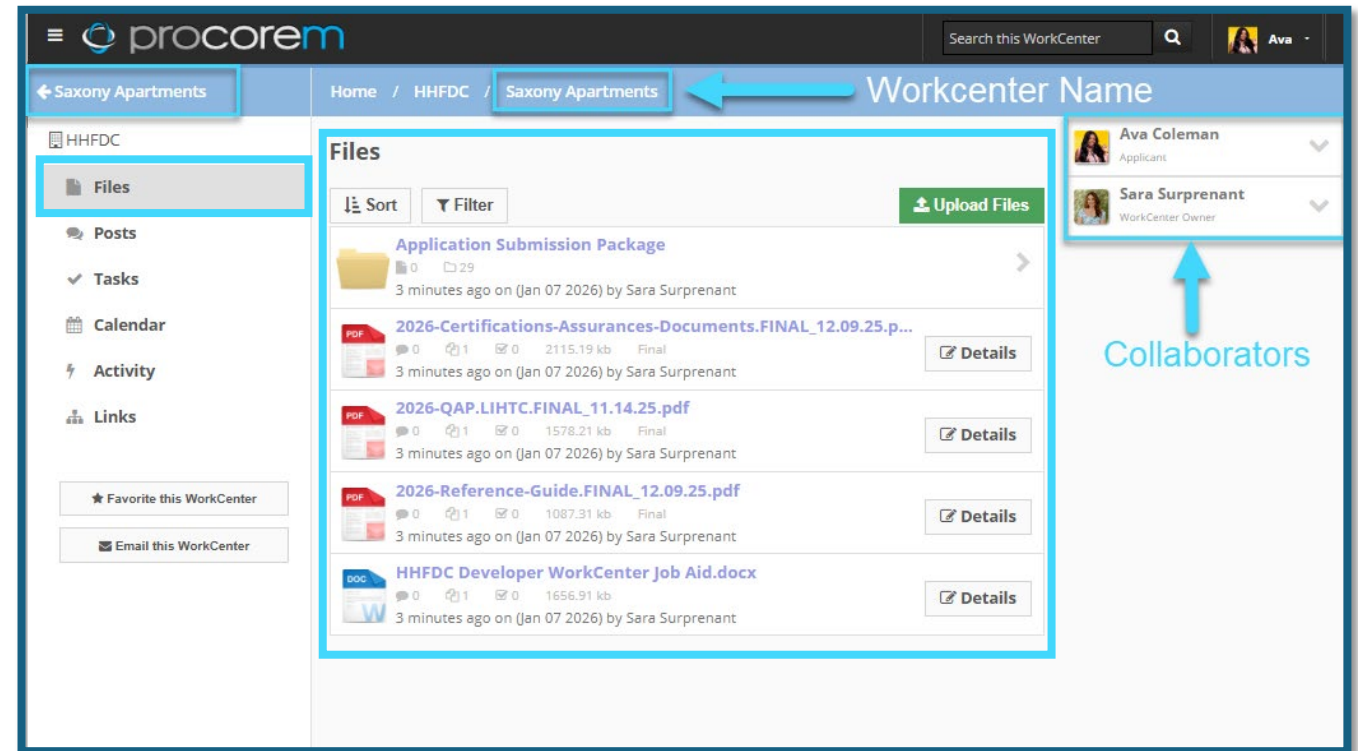
- Google Chrome (preferred)
- Microsoft Edge
- Apple Safari
- Mozilla Firefox



Procorem WorkCenters

A **WorkCenter** is created and used for each housing development and represents a single project. Once you accept an invitation to a **WorkCenter**, you become a **Collaborator** in the **WorkCenter** and can share documents, submit data, and assign and complete tasks related to your project.

Procorem's **File** functionality enables **HHFDC** to publish templates to the **WorkCenter** collaborators. In turn, the collaborators can submit the completed applications and all supporting documents on Procorem using **File** functionality.



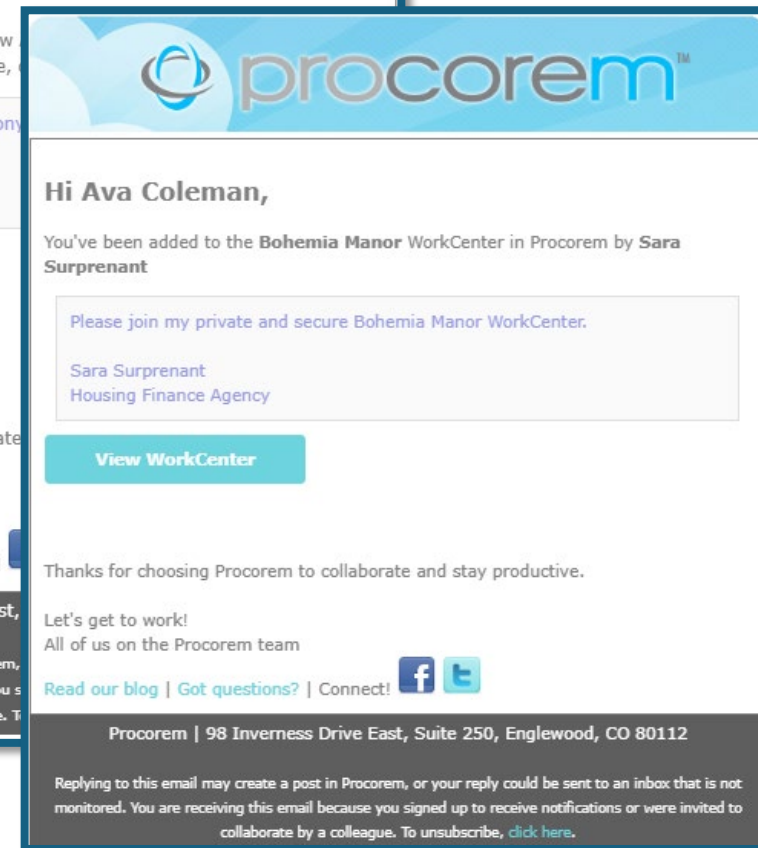
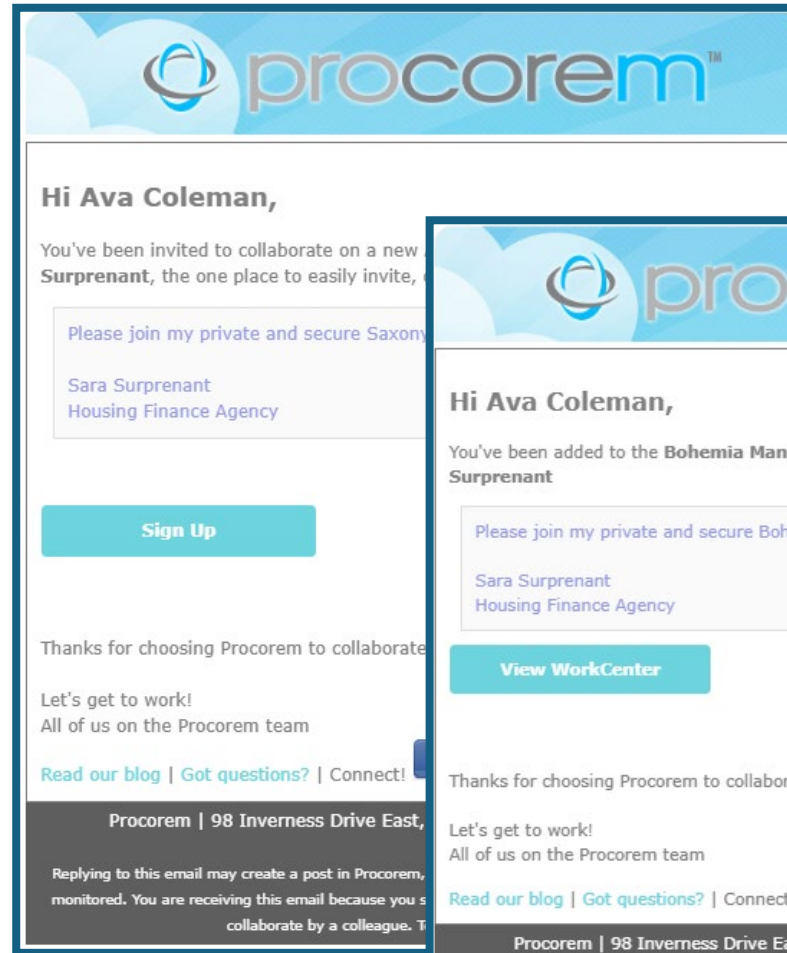


QUESTIONS?

02 Invitation to Procorem

Invitation to Procorem

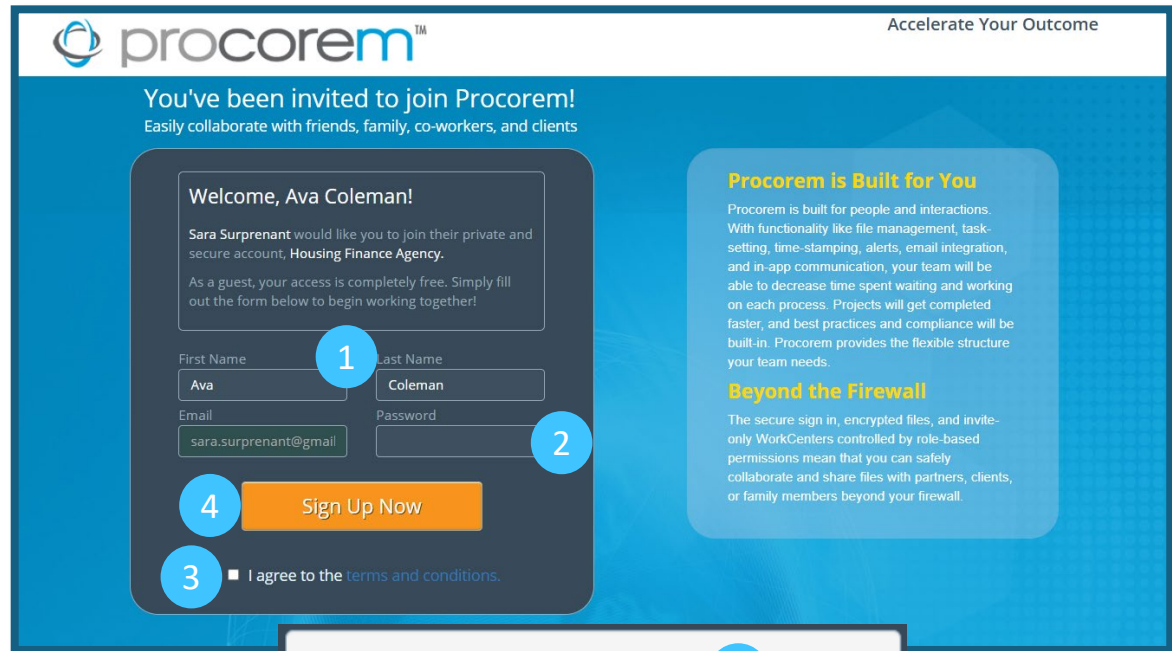
- ▶ When you're added to the **WorkCenter** as a collaborator, you'll receive an e-mail invitation **from your state agency**. ***Most of you should have received an invite from HHFDC within the past 24 hours***
- ▶ If it's the first time you've accessed **Procorem**, you'll need to create an account with the email address where the invitation was received. You'll be directed to the **Procorem Sign Up** page when clicking the **Sign Up** button.
- ▶ If you don't receive an invite, **verify your IT department has not marked emails from notifications@mail.procorem.com as spam.**
- ▶ Once you've created an account in **Procorem** and receive an invite to an additional **WorkCenter**, you can click on the **View WorkCenter** in the body of the email invitation to directly access **Procorem**.



Invitation to Procorem

Once you've clicked the **Sign Up** button on your invitation email, you'll see the **Sign Up Now** page.

- 1 Verify your **First Name, Last Name, and Email** are correct.
- 2 Enter a password that meets the **Password Criteria** requirements. The red text will turn green as each requirement is met while creating your password.
- 3 Click the checkbox next to **“I agree to the terms and conditions”** text.
- 4 Click the **Sign Up Now** button.



The screenshot shows the Procorem sign-up page. At the top left is the Procorem logo and the tagline "Accelerate Your Outcome". The main heading is "You've been invited to join Procorem!" with the subtext "Easily collaborate with friends, family, co-workers, and clients". Below this is a welcome message for "Ava Coleman" from Sara Surprenant. The form contains fields for First Name (Ava), Last Name (Coleman), Email (sara.surprenant@gmail), and Password. A "Sign Up Now" button is at the bottom right. A checkbox for "I agree to the terms and conditions" is at the bottom left. A callout box on the right titled "Procorem is Built for You" describes the platform's features. A callout box at the bottom right lists password requirements.

- ✓ 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.

Invitation to Procorem

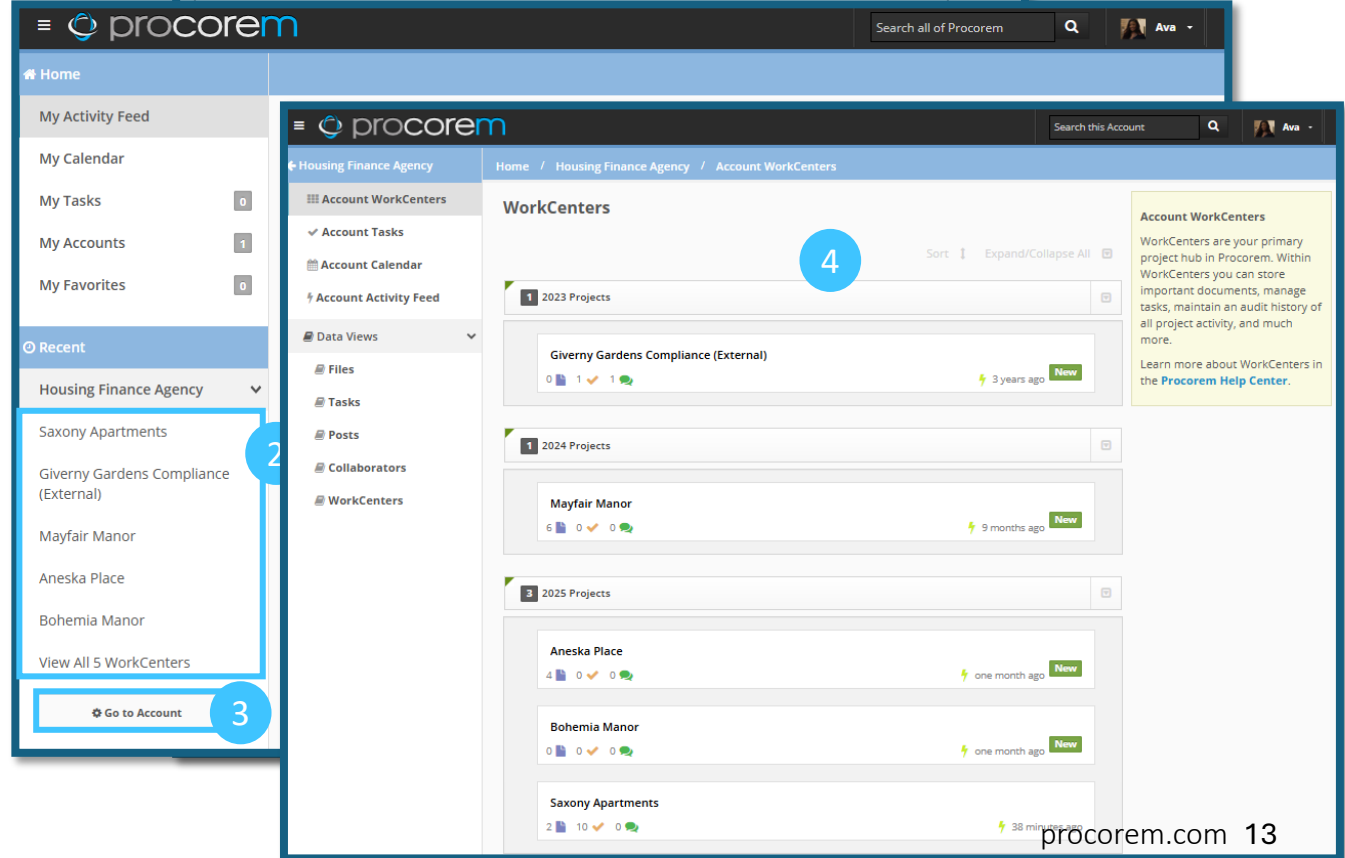
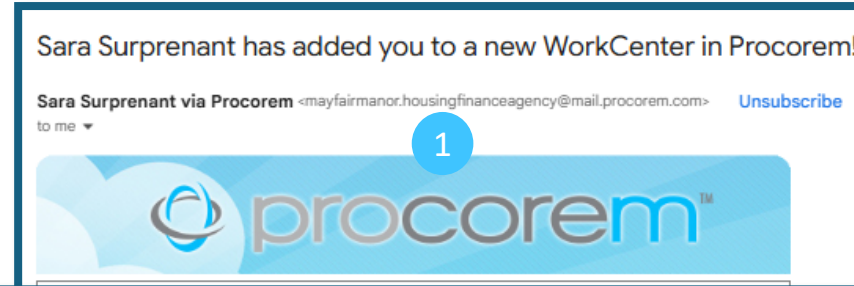
- 1 After clicking **Sign Up Now**, you'll be taken to the **Procorem Home** page.
- 2 On the left, you'll see the name of the **Agency** and the **WorkCenter** representing your property. Click on the name of the **WorkCenter** to access the **WorkCenter**.
- 3 Note other collaborators on the **WorkCenter**, including **Agency** contacts.
- 4 **Procorem** emails notifications in real time for file, post, and **WorkCenter** activities – if you'd like to receive one daily digest email instead of immediate emails, click the down arrow next to your name and deselect **Immediate Emails**.

The image displays three overlapping screenshots of the Procorem web application interface, illustrating the steps for accessing a WorkCenter and managing email preferences.

- Step 1:** The top screenshot shows the Procorem Home page. A blue banner for "TENANT PORTAL TRAINING FOR CE CREDIT" is prominent. A sidebar on the left contains navigation options like "My Activity Feed", "My Calendar", "My Tasks", "My Accounts", and "My Favorites". A "Recent" section is also visible.
- Step 2:** The middle screenshot shows a "WorkCenter" for "Saxony Apartments" under the "Housing Finance Agency". It features a "Files" section with options to "Upload Files" and "Create Folder". A list of collaborators is shown on the right, including "Ava Coleman" (Property Owner) and "Donna Meagle".
- Step 3:** The bottom screenshot shows a "Leave WorkCenter" dialog box. It includes a "Configure email preferences for this WorkCenter:" section with checkboxes for "Immediate Emails?" (unchecked) and "Include in Digest?" (checked).

Invitation to Procorem

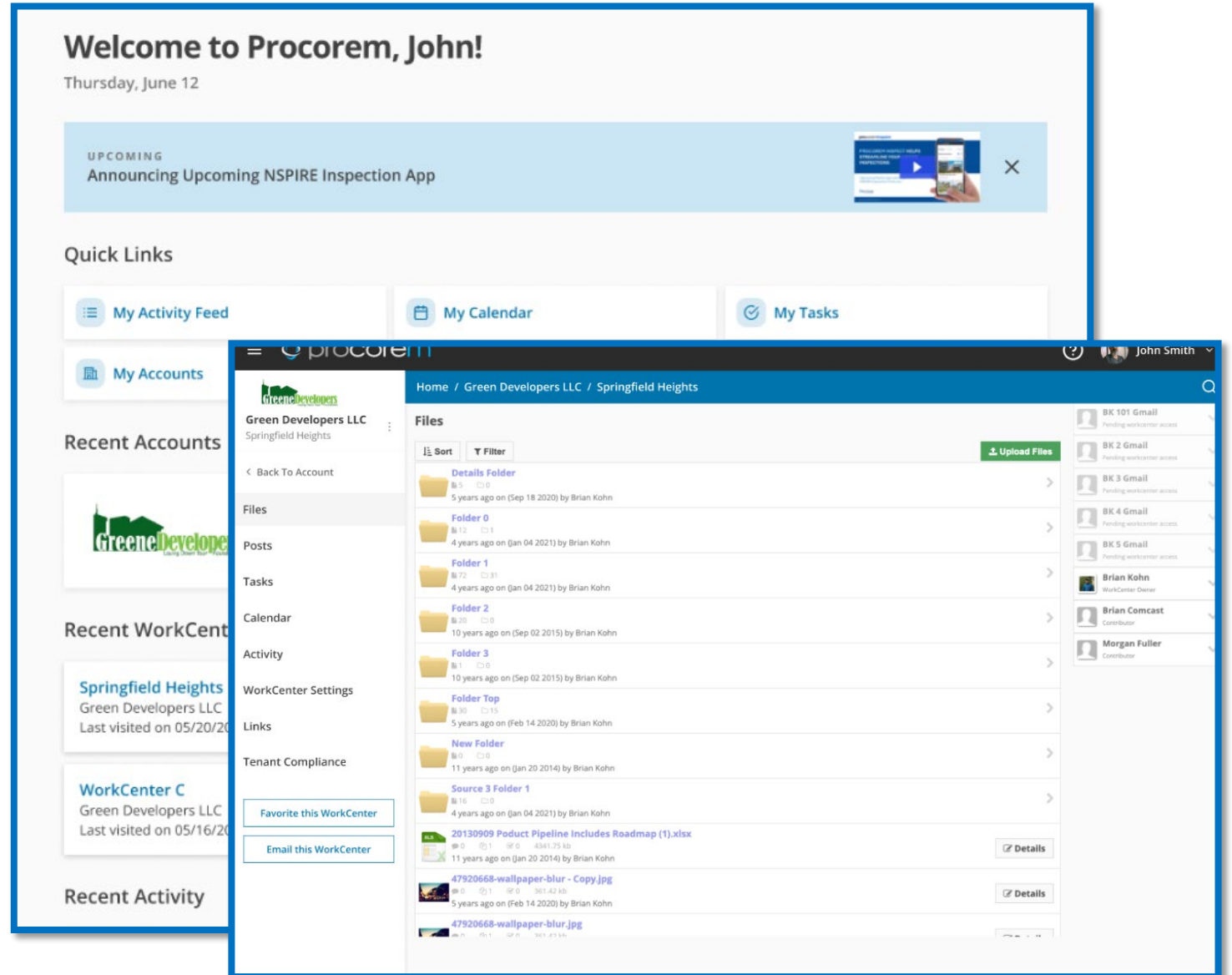
- 1 Once you've created your account, you'll receive an email invitation for each **WorkCenter** you've been invited to.
- 2 When you log in to Procorem, you'll see your **WorkCenter(s)** in the left nav panel.
- 3 To view all your **WorkCenters**, click on **Go To Account**.
- 4 If you don't have access to a needed **WorkCenter**, contact the **Agency** directly to request access.



2026 Updates

Procorem 2.0

In March 2026, updates to Procorem navigation will be available. The home page/dashboard will look and feel different, however, your **WorkCenter** options will look the same.





QUESTIONS?

03 Accessing the WorkCenter

Accessing the WorkCenter

Once you've downloaded and completed the **Letter of Intent To Apply** from the **HHFDC** website and notified **HHFDC**, you'll be invited to a Procorem **WorkCenter** as a **Collaborator** with a role of **Applicant**.

When you access the **WorkCenter** you've been invited to, you'll land on the **Files** page

The image shows a composite of two screenshots. The top screenshot is the HHFDC website, featuring the Department of Business, Economic Development & Tourism logo and a search bar. The navigation menu includes Home, About HHFDC, HHFDC Board of Directors, For Developers, Homeownership Programs, Federal Programs, Resources & Links, Media, Special Projects, Reports & Studies, Contact Information, Jobs!, and UIPA Request. The main content area displays 'Home > Consolidated Application for Financing - 2026' and 'CONSOLIDATED APPLICATION FOR FINANCING - 2026'.

The bottom screenshot is the Procorem WorkCenter interface for 'Saxony Apartments'. It shows a sidebar with navigation options: Files, Posts, Tasks, Calendar, Activity, and Links. The main area is titled 'Files' and contains a list of documents, including an 'Application Submission Package' folder and several PDF files such as '2026-Certifications-Assurances-Documents.FINAL_12.09.25.p...', '2026-QAP.LIHTC.FINAL_11.14.25.pdf', '2026-Reference-Guide.FINAL_12.09.25.pdf', and 'HHFDC Developer WorkCenter Job Aid.docx'. Each file entry includes a timestamp ('3 minutes ago on (Jan 07 2026)') and the uploader's name ('Sara Surprenant'). A right-hand sidebar shows user profiles for 'Ava Coleman' (Applicant) and 'Sara Surprenant' (WorkCenter Owner).

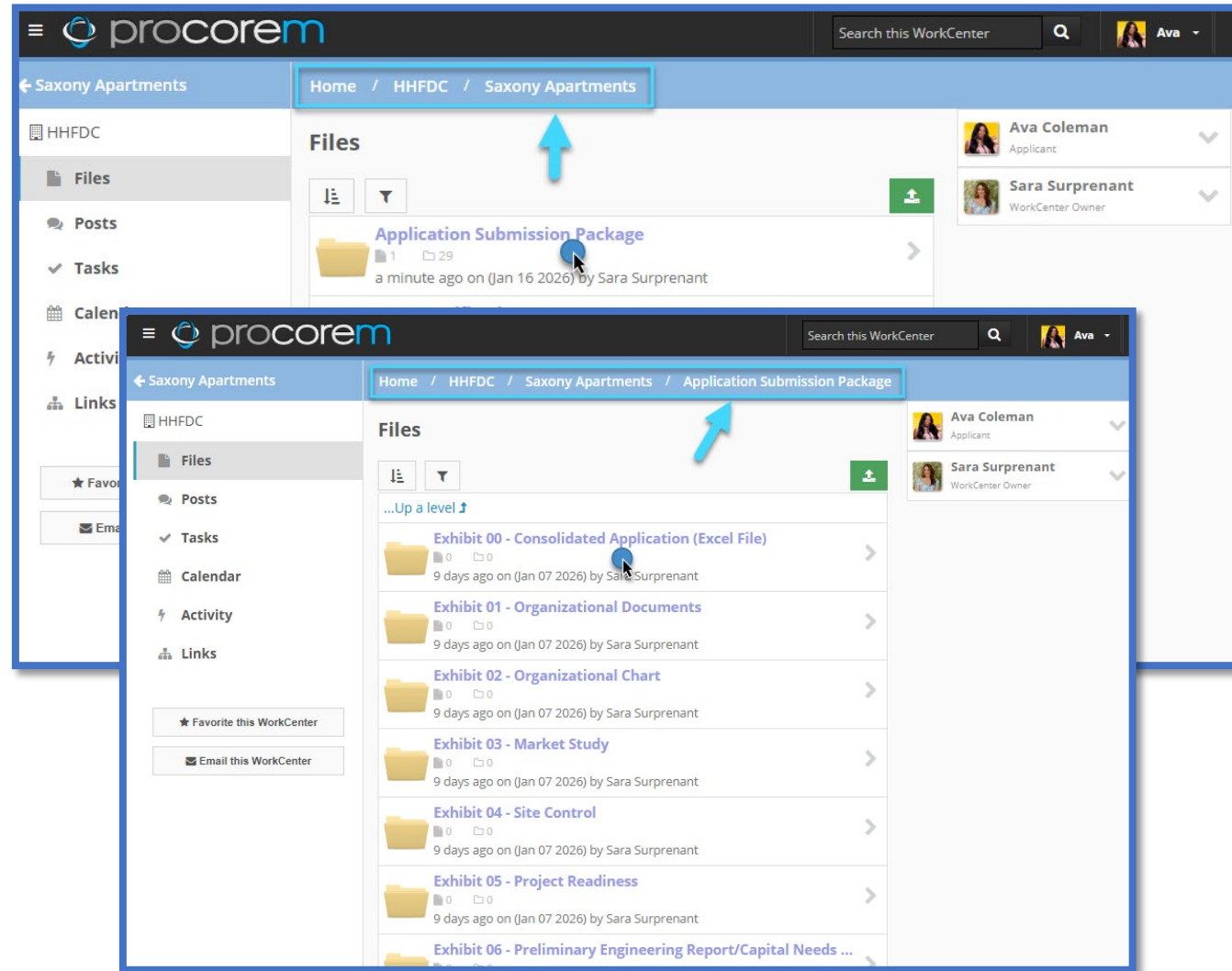
Files and Folders

You will upload your completed application to the **WorkCenter**.

To find the folder where additional documents should be uploaded, click on the **Application Submission Package** folder.

You'll see the subfolders for **Application Submission Package**. Click on each folder to upload the applicable documents.

Note the **breadcrumb** indicates where you are in the file/folder structure.



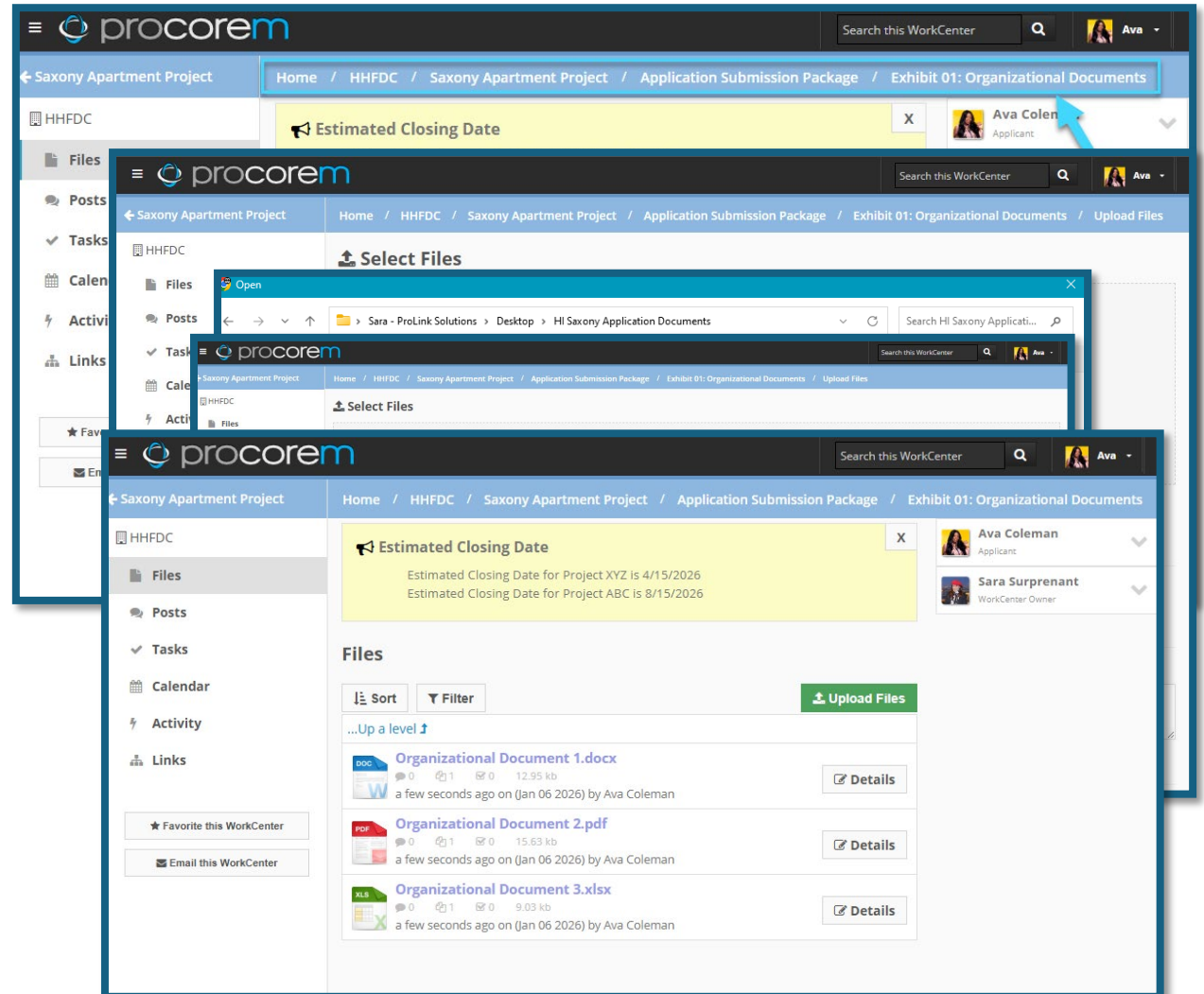
Uploading Files

Once in the correct folder for the file, click **Upload Files**.

Select **Choose File** or drag/drop from your computer.

The selected files will display on the **Select Files** screen. Click the **Upload** button.

The uploaded files will display.



Tasks

The **Tasks** option will display all tasks related to application submission. You can view tasks assigned to you. **Tasks** should be updated as completed.

Select the checkbox next to each task as you complete the **Application Submission** process. Once completed, the **Task Details** will display in strikethrough font.

February 20, 2026 at **2pm HST** is the hard deadline for submitting applications/documentations and completing tasks. **You will not be able to upload any documentation after this time as access will be deactivated for applicants!**

The screenshot displays the Procorem WorkCenter interface for 'Saxony Apartments'. The left sidebar shows navigation options: HHFDC, Files, Posts, Tasks (highlighted), Calendar, Activity, and Links. Below the sidebar are buttons for 'Favorite this WorkCenter' and 'Email this WorkCenter'. The main content area is titled 'Tasks' and includes controls for 'View: Task Group', 'Show Completed', 'Hide Details', and a '+ Create New Task' button. A list of tasks is shown under the 'Application Submission' group:

Progress	Task Name	Assignees	Approvers	Complete	Created
<input checked="" type="checkbox"/> 1/1	Application Exhibits Submitted	Ava Coleman - Applicant	No Approvers	1/16/2026	Created 9 days ago on (Jan 07 2026) by Sara Surprenant
<input type="checkbox"/> 0/1	Application Fee Paid	Ava Coleman - Applicant	No Approvers	New	Created 9 days ago on (Jan 07 2026) by Sara Surprenant
<input checked="" type="checkbox"/> 1/1	Consolidated Application Uploaded	Ava Coleman - Applicant	No Approvers	1/16/2026	Created 9 days ago on (Jan 07 2026) by Sara Surprenant

At the bottom, a 'No Group' section shows 'No Tasks Found'. The right sidebar displays user profiles for Ava Coleman (Applicant) and Sara Surprenant (WorkCenter Owner).

Completing a Task

Click on the **Task** to view the **Edit Task** screen.

To complete task, click **Mark Finished**.

Click **OK** to complete task or **Cancel** if not ready to complete task.

Task finished successfully message will appear when marked finished.

The image displays three overlapping screenshots of the Procorem WorkCenter interface, illustrating the steps to complete a task:

- Top Screenshot:** Shows the 'Estimated Closing Date' for a task. The task title is 'Application Exhibits Submitted' and the status is 'Pending Assignees'. The estimated closing date for Project XYZ is 4/15/2026, and for Project ABC is 8/15/2026.
- Middle Screenshot:** Shows the 'Edit Task' screen. The task title is 'Application Exhibits Submitted' and the status is 'Pending Assignees'. The task group is 'Application Submission'.
- Bottom Screenshot:** Shows the 'Edit Task' screen after the task has been completed. The status is 'Complete - 1/6/2026'. A green banner at the top of the screen reads 'Task finished successfully!'. A blue callout box with 'OK' is overlaid on the right side of the screen.

View WorkCenter Activity

You can view all activity on the WorkCenter by selecting **Activity** in the left navigation panel.

The screenshot displays the Procorem WorkCenter interface for the 'Saxony Apartment Project'. The left navigation panel is visible, with the 'Activity' option highlighted. The main content area shows a yellow notification banner for 'Estimated Closing Date' and a list of activity items. Each activity item includes a user profile picture, a checkmark, a title, start and due dates, and project context.

Estimated Closing Date
Estimated Closing Date for Project XYZ is 4/15/2026
Estimated Closing Date for Project ABC is 8/15/2026

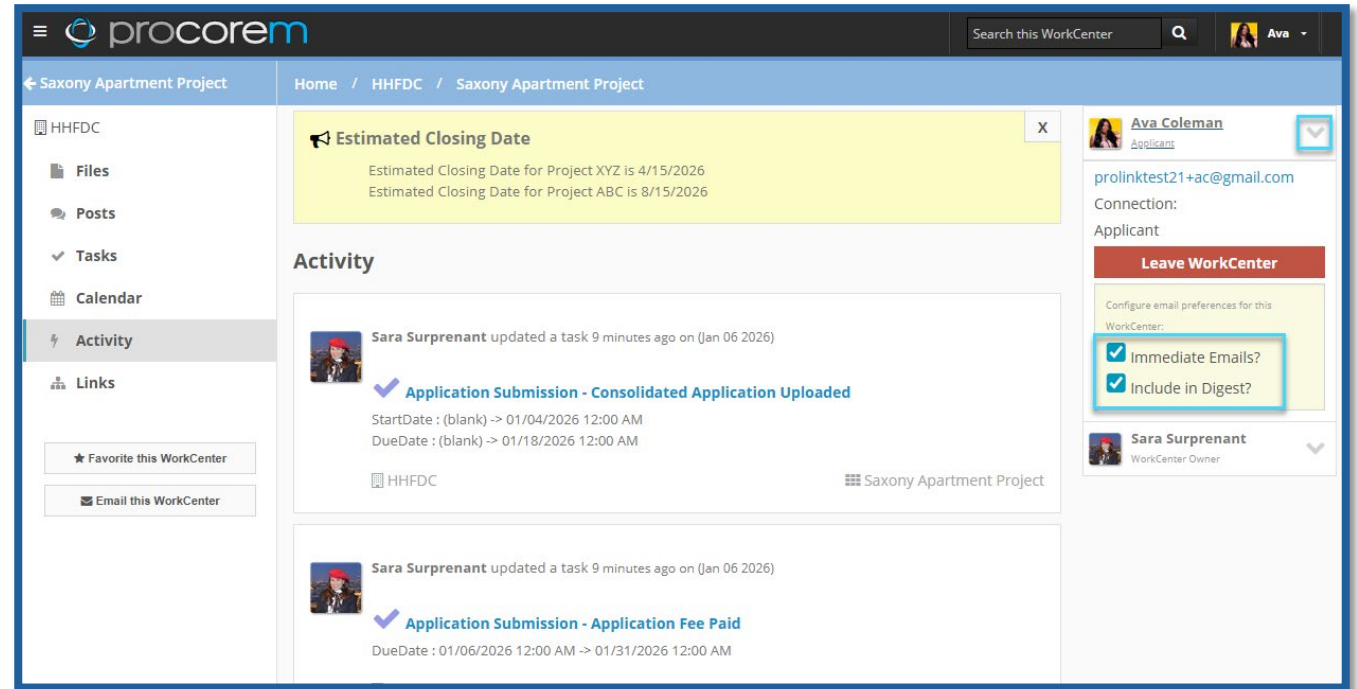
Activity

- Sara Surprenant updated a task 9 minutes ago on (Jan 06 2026)
✓ **Application Submission - Consolidated Application Uploaded**
StartDate : (blank) -> 01/04/2026 12:00 AM
DueDate : (blank) -> 01/18/2026 12:00 AM
HHFDC Saxony Apartment Project
- Sara Surprenant updated a task 9 minutes ago on (Jan 06 2026)
✓ **Application Submission - Application Fee Paid**
DueDate : 01/06/2026 12:00 AM -> 01/31/2026 12:00 AM
HHFDC Saxony Apartment Project
- Sara Surprenant updated a task 9 minutes ago on (Jan 06 2026)
✓ **Application Submission - Application Exhibits Submitted**
StartDate : (blank) -> 01/09/2026 12:00 AM
DueDate : (blank) -> 01/15/2026 12:00 AM
HHFDC Saxony Apartment Project

Update Preferences - WorkCenter

Immediate Emails—Selecting the Immediate Emails preference will ensure that you receive email notifications on all WorkCenter related activities. Any time comments are made, tasks statuses change, documents are engaged with, you will receive a notification to ensure you stay informed.

Daily Digest—The daily digest provides a summary of all the activity, across all subscribed WorkCenters, in a consolidated email, excluding activity from archived WorkCenters. Once a day, users receive the email which outlines task updates, trending topics and documents, and important project milestones.



The screenshot displays the Procorem WorkCenter interface for the 'Saxony Apartment Project'. The left sidebar contains navigation options: Files, Posts, Tasks, Calendar, Activity (selected), and Links. The main content area shows an 'Estimated Closing Date' notification and an 'Activity' feed with two entries: 'Application Submission - Consolidated Application Uploaded' and 'Application Submission - Application Fee Paid'. The right sidebar shows the user profile for 'Ava Coleman' and a 'Leave WorkCenter' button. Below this, a 'Configure email preferences for this WorkCenter' section is visible, with checkboxes for 'Immediate Emails?' and 'Include in Digest?' both checked.

Update Preferences - Profile

You can also update email preferences by selecting **Preferences** under your avatar.

The screenshot shows the Procorem WorkCenter interface. At the top, there is a search bar and a user profile dropdown menu for 'Ava'. The main content area is titled 'Home / Your Profile' and features a navigation bar with tabs for Profile, Picture, Invites, Security, Preferences (which is highlighted), and Background Processes. The 'Preferences' section is active, showing options for email notifications. The 'Email notifications?' section has two radio buttons: '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 dropdown menu for 'Select how often you'd like to receive a digest email' set to 'Daily'. A 'Save Changes' button is visible. At the bottom, there is a section for 'Configure email preferences for the following account' with a dropdown menu set to '--Select--' and a message: 'Select an account to configure your email notification preferences.'



QUESTIONS?

04 Help Center for Procorem

Procorem Help

You can access the **Procorem Help Center** by selecting **Help** from the menu under your avatar.

The image shows a screenshot of the Procorem WorkCenter interface. The top navigation bar includes the Procorem logo, a search bar for the WorkCenter, and a user profile dropdown menu for 'Ava'. The dropdown menu contains options for Profile, Invites, Preferences, Help (highlighted with a blue box), and Logout. The main content area displays a yellow notification for 'Estimated Closing Date' with details for Project XYZ and Project ABC. Below this, a large overlay window shows the Procorem Help Center landing page. This page features the Procorem logo, the heading 'How can we help you today?', a search bar, and four app tiles: Procorem, Tenant Portal App, Procorem Inspect App, and Supportive Services Rent Roll App. A copyright notice '© 2025 ProLink Solutions' is visible at the bottom of the overlay.



QUESTIONS?

THANK YOU!