



Introduction to Procorem

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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.

Workcenter Name

Collaborators

File	Details
Application Submission Package	
2026-Certifications-Assurances-Documents.FINAL_12.09.25.pdf	
2026-QAP.LIHTC.FINAL_11.14.25.pdf	
2026-Reference-Guide.FINAL_12.09.25.pdf	
HHFDC Developer WorkCenter Job Aid.docx	



QUESTIONS?

02 Invitation to Procorem



2. 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.procurement.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**.

Hi Ava Coleman,

You've been invited to collaborate on a new WorkCenter, **Saxony**, by **Sara Surprenant**, the one place to easily invite, collaborate, and stay productive.

Please join my private and secure Saxony WorkCenter.

Sara Surprenant
Housing Finance Agency

Sign Up

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

Replies 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](#).

Hi Ava Coleman,

You've been added to the **Bohemia Manor** WorkCenter in Procorem by **Sara Surprenant**

Please join my private and secure Bohemia Manor WorkCenter.

Sara Surprenant
Housing Finance Agency

View WorkCenter

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!](#)

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Invitation to Procurement

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.



Accelerate Your Outcome

You've been invited to join Procurement! Easily collaborate with friends, family, co-workers, and clients

Welcome, Ava Coleman!

Sara Surprenant would like you to join their private and secure account, Housing Finance Agency.

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

1 First Name: Ava Last Name: Coleman
2 Email: sara.suprenant@gmail.com Password:

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

4 Sign Up Now

Procurement is Built for You

Procurement is built for people and interactions. With functionality like file management, task-setting, time-stamping, alerts, email integration, and in-app communication, your team will be able to decrease time spent waiting and working on each process. Projects will get completed faster, and best practices and compliance will be built-in. Procurement provides the flexible structure your team needs.

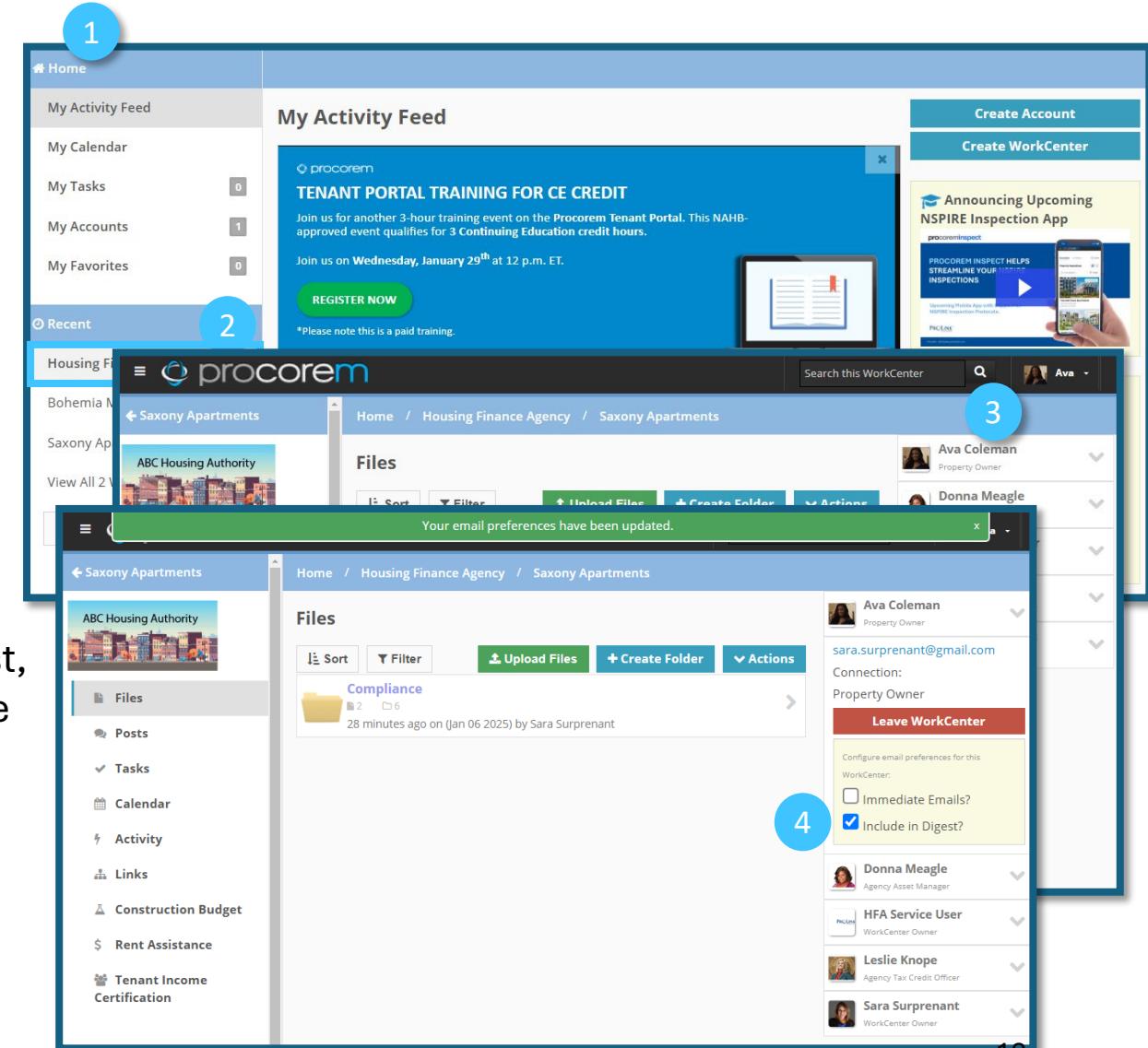
Beyond the Firewall

The secure sign in, encrypted files, and invite-only WorkCenters controlled by role-based permissions mean that you can safely collaborate and share files with partners, clients, or family members beyond your firewall.

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 Procurement

- 1 After clicking **Sign Up Now**, you'll be taken to the **Procurement 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 **Procurement** 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**.



1

2

3

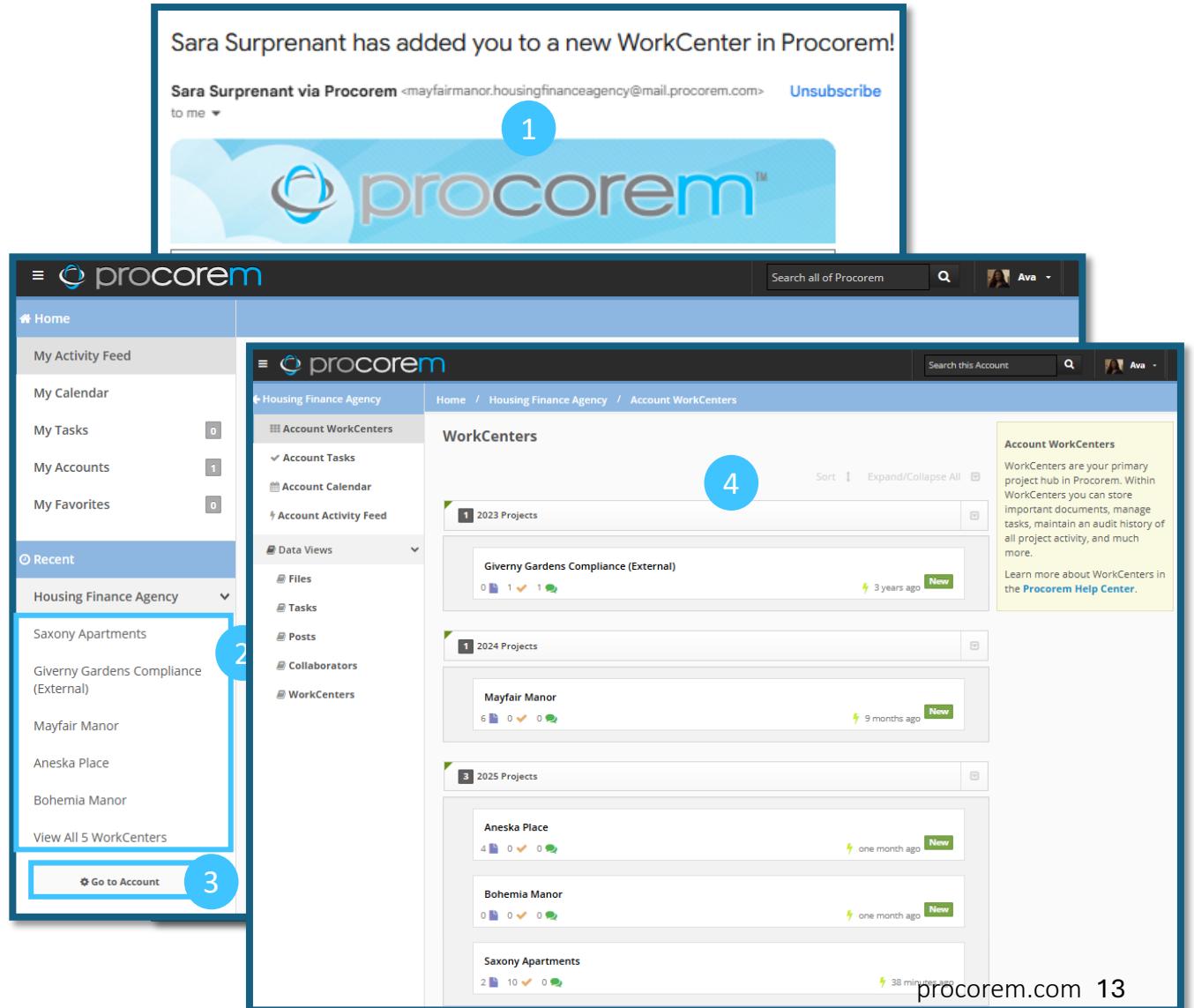
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Invitation to Procurement

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



Sara Surprenant has added you to a new WorkCenter in Procurement!

Sara Surprenant via Procurement <mayfairmanor.housingfinanceagency@mail.procurement.com> [Unsubscribe](#)

to me

1

procurement

Search all of Procurement

2

procurement

Home

My Activity Feed

My Calendar

My Tasks 0

My Accounts 1

My Favorites 0

Recent

Housing Finance Agency

Saxony Apartments

Giverny Gardens Compliance (External)

Mayfair Manor

Aneska Place

Bohemia Manor

View All 5 WorkCenters

2

3

4

procurement

Home / Housing Finance Agency / Account WorkCenters

WorkCenters

2023 Projects

Giverny Gardens Compliance (External)

3 years ago

2024 Projects

Mayfair Manor

9 months ago

2025 Projects

Aneska Place

one month ago

Bohemia Manor

one month ago

Saxony Apartments

38 minutes ago

Account WorkCenters

WorkCenters are your primary project hub in Procurement. Within WorkCenters you can store important documents, manage tasks, maintain an audit history of all project activity, and much more.

Learn more about WorkCenters in the [Procurement Help Center](#).

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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.

Welcome to Procorem, John!

Thursday, June 12

UPCOMING

Announcing Upcoming NSPIRE Inspection App



X

Quick Links

[My Activity Feed](#) [My Calendar](#) [My Tasks](#)

[My Accounts](#)

Recent Accounts



Green Developers LLC
Springfield Heights

Back To Account

Recent WorkCenters

Springfield Heights
Green Developers LLC
Last visited on 05/20/2020

WorkCenter C
Green Developers LLC
Last visited on 05/16/2020

Recent Activity

Favorite this WorkCenter

Email this WorkCenter

John Smith

BK 101 Gmail Pending workcenter access

BK 2 Gmail Pending workcenter access

BK 3 Gmail Pending workcenter access

BK 4 Gmail Pending workcenter access

BK 5 Gmail Pending workcenter access

Brian Kohn WorkCenter Owner

Brian Comcast Contributor

Morgan Fuller Contributor



QUESTIONS?

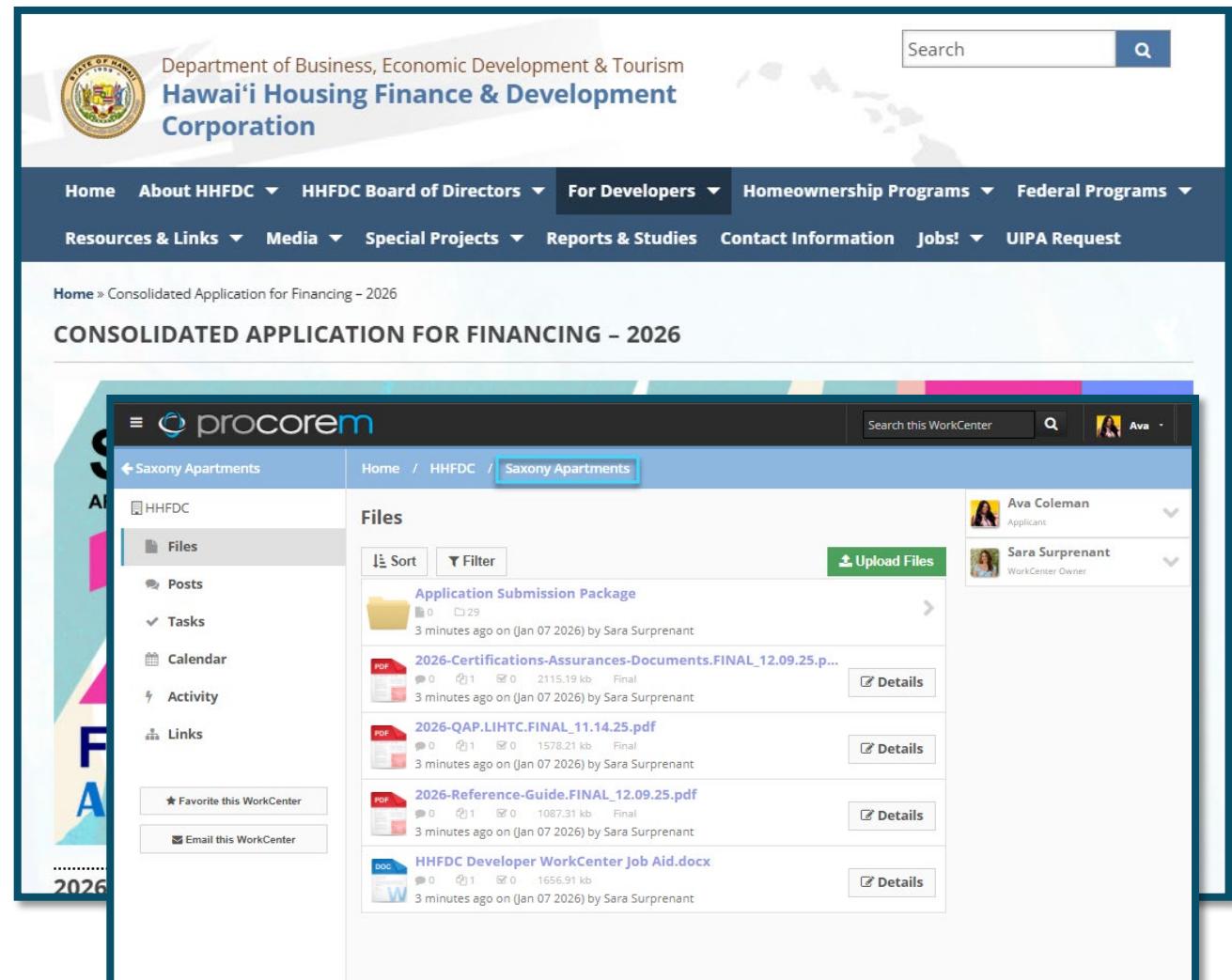
03 Accessing the WorkCenter



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 Procore **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





3. Accessing the WorkCenter



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.

The screenshots illustrate the file structure in the Procore WorkCenter. The top screenshot shows the main 'Files' section for the 'Saxony Apartments' project. The breadcrumb path 'Home / HHFDC / Saxony Apartments' is highlighted with a blue box, and a blue arrow points to the 'Application Submission Package' folder, which is also highlighted with a blue box. The bottom screenshot shows the contents of the 'Application Submission Package' folder, with the breadcrumb path 'Home / HHFDC / Saxony Apartments / Application Submission Package' highlighted with a blue box, and a blue arrow pointing to the 'Exhibit 00 - Consolidated Application (Excel File)' folder, which is also highlighted with a blue box. Both screenshots also show the user profiles for 'Ava Coleman' (Applicant) and 'Sara Surprenant' (WorkCenter Owner) in the top right corner.

3. Accessing the WorkCenter



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.

The screenshot illustrates the Procore WorkCenter interface for uploading files. The main window shows the 'Files' section with three uploaded documents: 'Organizational Document 1.docx', 'Organizational Document 2.pdf', and 'Organizational Document 3.xlsx'. The 'Upload Files' button is located in the top right of the 'Select Files' dialog. A blue arrow points to the 'Ava Coleman' user profile in the top right corner of the main window, indicating the user performing the action.

File Type	File Name	Upload Date	Uploader
DOC	Organizational Document 1.docx	a few seconds ago on (Jan 06 2026)	Ava Coleman
PDF	Organizational Document 2.pdf	a few seconds ago on (Jan 06 2026)	Ava Coleman
XLSX	Organizational Document 3.xlsx	a few seconds ago on (Jan 06 2026)	Ava Coleman



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 shows the Procore WorkCenter interface. The left sidebar shows 'HHFDC' and 'Tasks' (which is highlighted with a blue box). The main content area is titled 'Tasks' and shows three completed tasks under 'Application Submission':

- Application Exhibits Submitted**
Assignee: ~~Ava Coleman~~ - Applicant
No Approvers
Complete - 1/16/2026
Created 9 days ago on (Jan 07 2026) by Sara Surprenant
- Application Fee Paid**
Assignee: ~~Ava Coleman~~ - Applicant
No Approvers
New
Created 9 days ago on (Jan 07 2026) by Sara Surprenant
- Consolidated Application Uploaded**
Assignee: ~~Ava Coleman~~ - Applicant
No Approvers
Complete - 1/16/2026
Created 9 days ago on (Jan 07 2026) by Sara Surprenant

At the bottom, it says 'No Group' and 'No Tasks Found'.



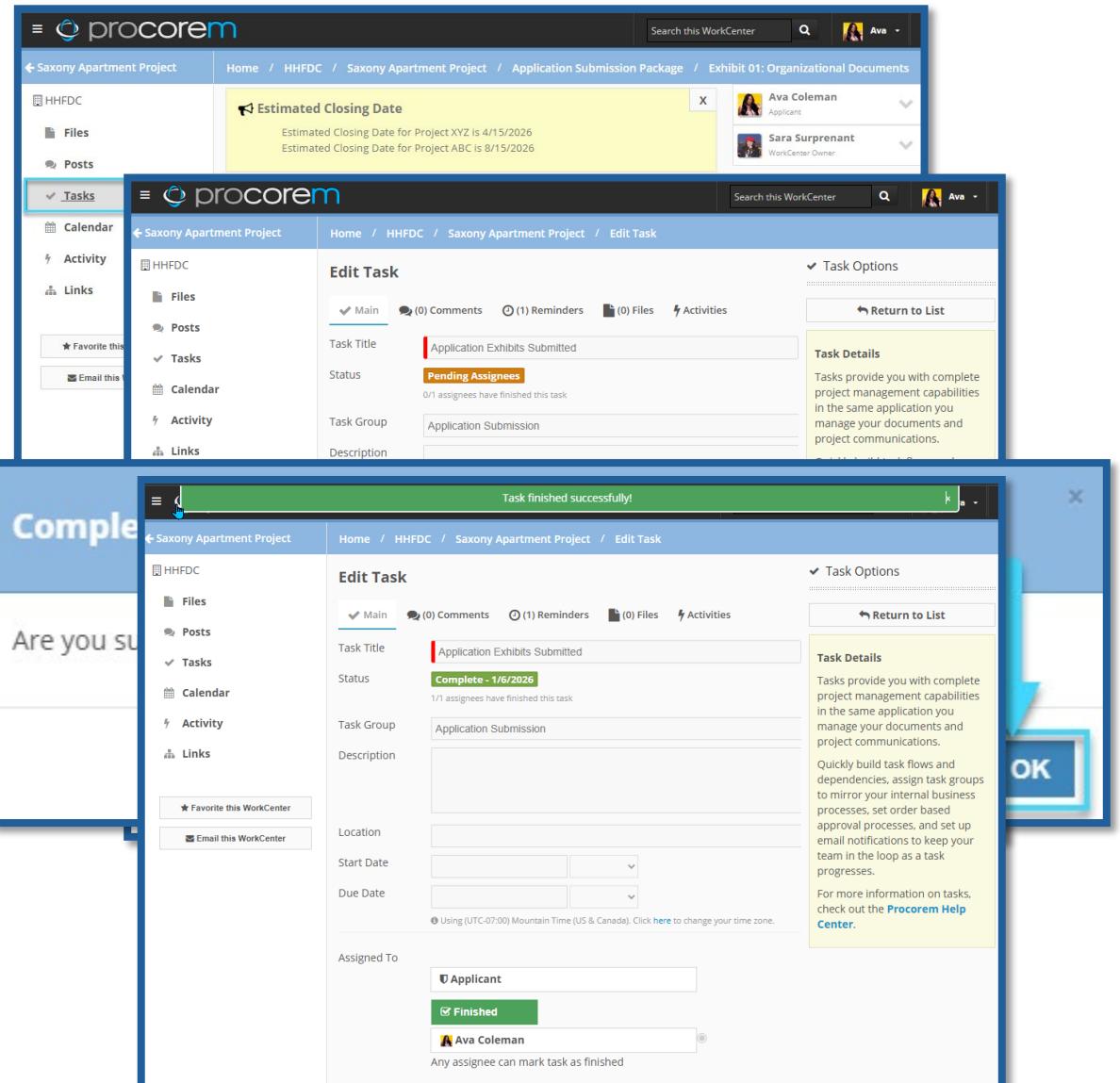
Completing a Task

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.



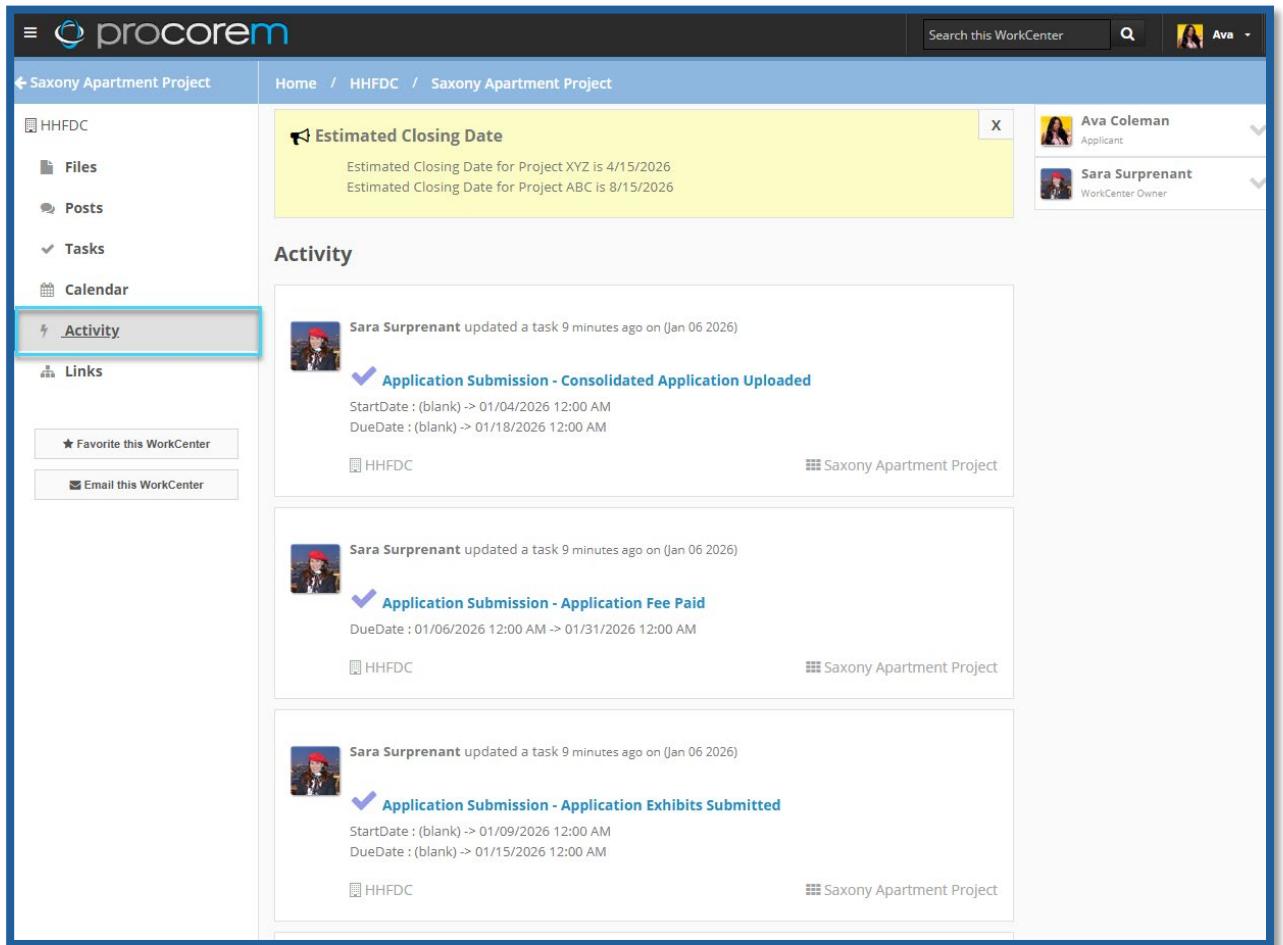
The image displays three stacked screenshots of the Procore WorkCenter interface, illustrating the process of completing a task:

- Top Screenshot:** Shows the "Edit Task" screen for the "Application Exhibits Submitted" task. The "Status" field is set to "Pending Assignees" (0/1 assignees have finished this task). The "Description" field is "Application Submission". The "Task Details" sidebar provides information about tasks and project management.
- Middle Screenshot:** Shows the "Edit Task" screen with the "Status" field updated to "Complete - 1/6/2026" (1/1 assignees have finished this task). The "Description" field is "Application Submission". The "Task Details" sidebar remains the same.
- Bottom Screenshot:** Shows a confirmation message "Task finished successfully!" above the "Edit Task" screen. The "Status" field is now "Complete - 1/6/2026". The "Description" field is "Application Submission". The "Assigned To" field is set to "Applicant" with "Finished" checked and "Ava Coleman" selected. The "Task Details" sidebar is visible on the right.



View WorkCenter Activity

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



The screenshot shows the Procore WorkCenter interface. The left navigation panel is open, displaying a list of categories: HHFDC, Files, Posts, Tasks, Calendar, and Activity. The 'Activity' category is highlighted with a blue box. The main content area shows the 'Saxony Apartment Project' WorkCenter. At the top, there is a 'Estimated Closing Date' card with information for Project XYZ and Project ABC. Below this is the 'Activity' feed, which lists three recent updates from 'Sara Surprenant' (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
- Application Submission - Application Fee Paid**
DueDate : 01/06/2026 12:00 AM -> 01/31/2026 12:00 AM
- Application Submission - Application Exhibits Submitted**
StartDate : (blank) -> 01/09/2026 12:00 AM
DueDate : (blank) -> 01/15/2026 12:00 AM

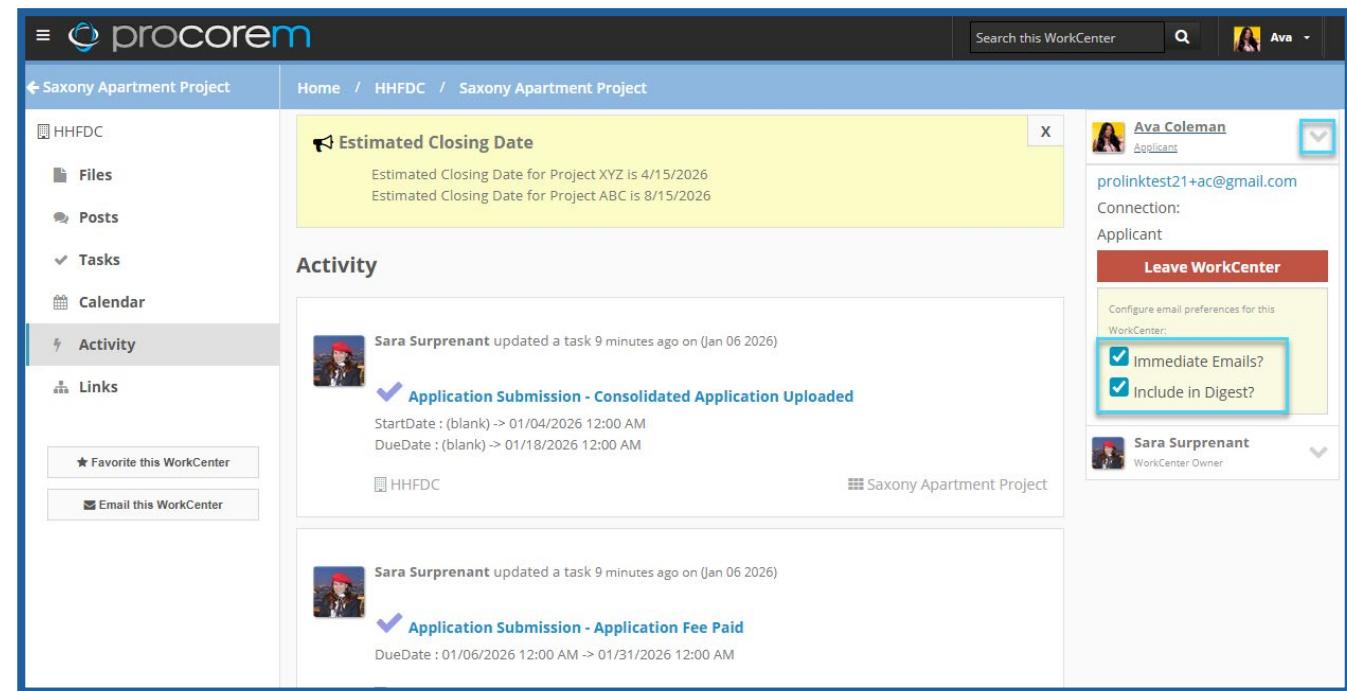
On the right side of the interface, there are two user profiles: 'Ava Coleman' (Applicant) and 'Sara Surprenant' (WorkCenter Owner). The top right corner also features a search bar and a user dropdown menu.



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 shows the Procore WorkCenter interface for the 'Saxony Apartment Project'. The left sidebar includes links for HHFDC, Files, Posts, Tasks, Calendar, and Activity (which is selected). The main content area displays activity feed items:

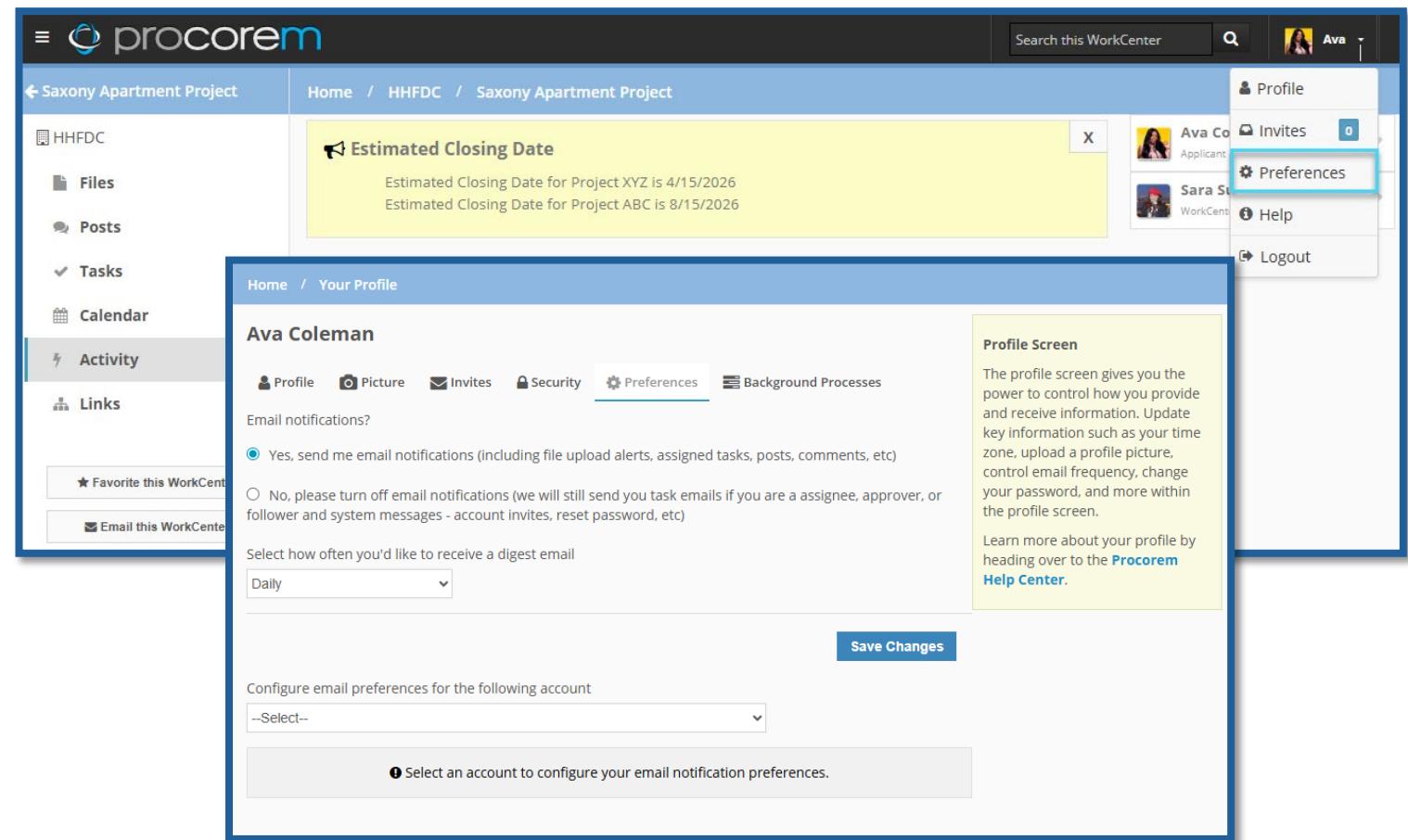
- Estimated Closing Date**: Estimated Closing Date for Project XYZ is 4/15/2026. Estimated Closing Date for Project ABC is 8/15/2026.
- Activity**:
 - Sara Surprenant updated a task 9 minutes ago on (Jan 06 2026).
 - Application Submission - Consolidated Application Uploaded**:
StartDate : (blank) -> 01/04/2026 12:00 AM
DueDate : (blank) -> 01/18/2026 12:00 AM
 - Application Submission - Application Fee Paid**:
DueDate : 01/06/2026 12:00 AM -> 01/31/2026 12:00 AM

The right sidebar shows user information for 'Ava Coleman' (Applicant) and 'Sara Surprenant' (WorkCenter Owner). A 'Configure email preferences for this WorkCenter' section is open, showing two checked checkboxes: 'Immediate Emails?' and 'Include in Digest?'. The 'Include in Digest?' checkbox is highlighted with a blue border.



Update Preferences - Profile

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



The screenshot shows the Procore WorkCenter interface. On the left, a sidebar lists 'HHFDC', 'Files', 'Posts', 'Tasks', 'Calendar', 'Activity' (which is selected and highlighted with a blue box), and 'Links'. Below these are buttons for 'Favorite this WorkCenter' and 'Email this WorkCenter'. The main content area shows a 'Estimated Closing Date' message: 'Estimated Closing Date for Project XYZ is 4/15/2026' and 'Estimated Closing Date for Project ABC is 8/15/2026'. Below this is the 'Your Profile' page for 'Ava Coleman'. The 'Preferences' tab is selected and highlighted with a blue box. The page includes sections for 'Email notifications?' (radio buttons for 'Yes' and 'No'), 'Select how often you'd like to receive a digest email' (a dropdown menu showing 'Daily'), and a 'Save Changes' button. To the right of the profile page is a 'Profile Screen' sidebar with text about updating profile information and a link to the 'Procore Help Center'. The top right corner shows a user menu with 'Profile', 'Invites' (0 notifications), 'Preferences' (highlighted with a blue box), 'Help', and 'Logout'. The Procore logo is in the top left corner of the main content area.

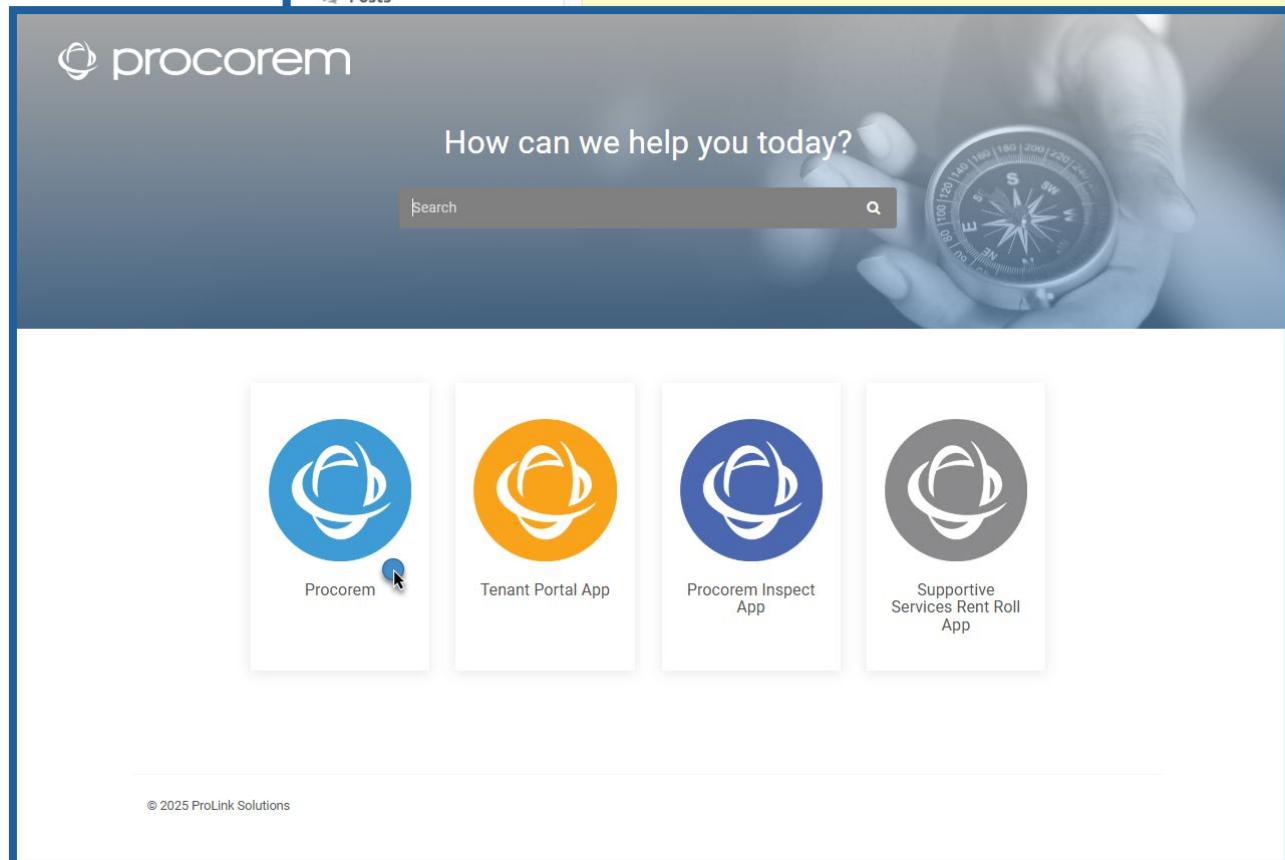
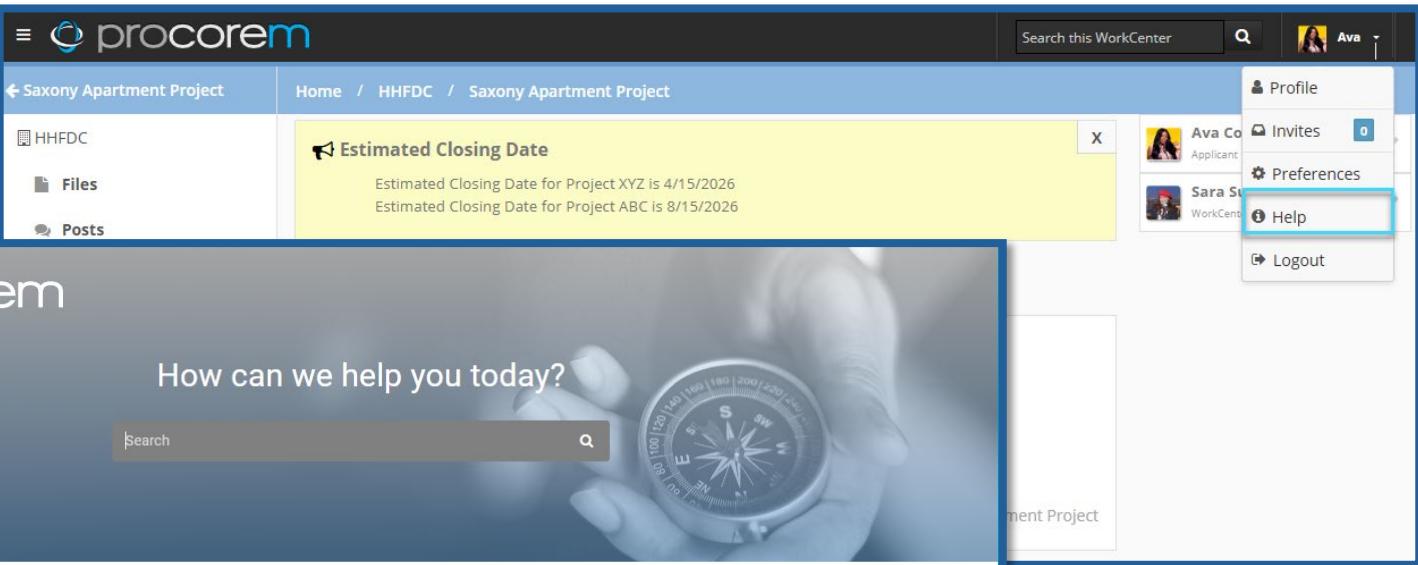


QUESTIONS?

04 Help Center for Procorem

Procurement Help

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



The image displays two screenshots of the Procurement platform. The top screenshot shows the WorkCenter interface with a user's profile and a menu on the right. The 'Help' option in the menu is highlighted with a blue box. The bottom screenshot shows the mobile app's main screen with four app icons, and the Procurement app icon is highlighted with a blue box. Both screenshots feature the Procurement logo and a search bar.



QUESTIONS?

THANK YOU!