# HCD Connect for Local Governments

HCD CONNECT USER PORTAL | Quick Reference Guide



#### **HCD CONNECT**



#### Overview

- > Background and Updates to 2024 APR Excel Form
- > The purpose and features of the HCD Connect External User Portal
- > Online portal registration process
- > Adding / removing consultants from Jurisdiction Account
- > Submitting Annual Progress Reports



## Changes to 2024 APR Form

- Streamlined Ministerial Approval Process (SMAP): Updated references from SB 35 to SB 423
- **SB 9 Lot Splits:** Data validators now allow zero units for qualifying projects.
- Enhanced Data Reporting: Updated Table B (homes permitted) data and planning/projection period information
- Table D (applications for housing development) Improvements:
  - Removed the "General Comments" cell
  - Increased the default row count to 200
  - Expanded the character limit in Column D to 10,000



# How to Register

HCD CONNECT USER PORTAL | Registration Steps



# New User Registration – Create A New Account

You must register before you can use the Portal. To complete the registration, complete the following steps:

- 1. Enter the <u>Portal URL</u> into your web browser. You will see the login screen home page.
- 2. Click Create a New Account.



Username		
		1
Password		
Log In		
Forgot your pas	sword?	
lot Registered?	Create an account	
		-



## New User Registration - Create a New Account

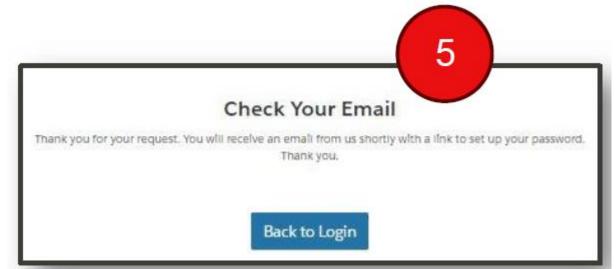
- 3. Enter your First Name, Last Name and Work Email. Then select **Applicant** for Role Type.
- 4. Click Register to continue.

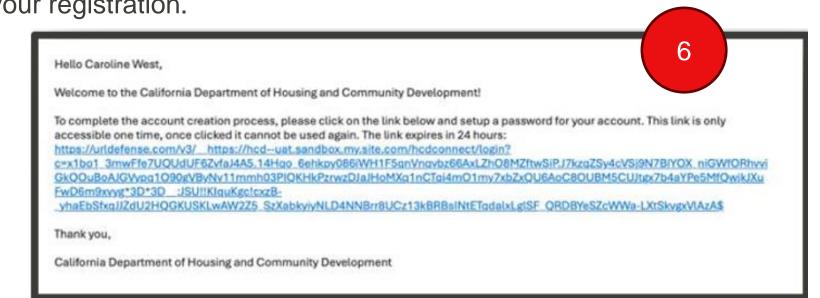
First Name	
Last Name	
Emall	**Role Type
Role Type Select Role Type	Applicant Consultant
Register Already have an account?	



## New User Registration – Setup Password

- 5. You should receive an email from the system with a link to setup your portal password. If you do not receive this email, please check your Spam folder.
- 6. Click the link in the email that will direct you to the password setup screen to continue your registration.





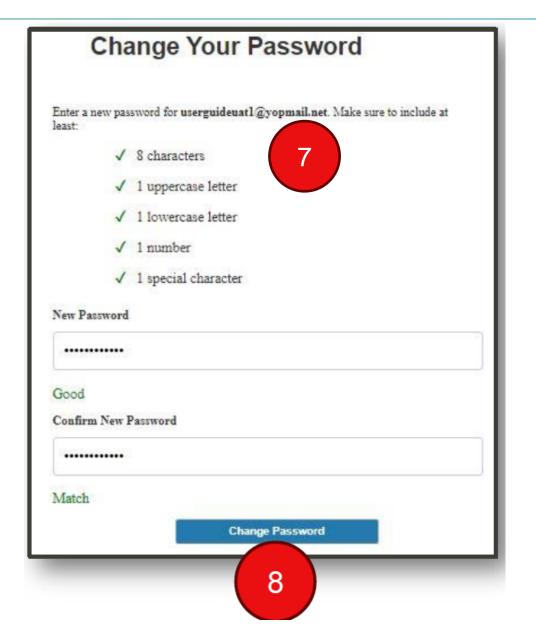


# New User Registration – Setup Password

7. Enter in your desired password.

The password must contain:

- 12 characters
- 1 uppercase letter
- 1 lowercase letter
- 1 number
- 1 special character
- 8. Click **Change Password** to successfully create your password.





9. Once you have created a password, you will be taken to the Portal's welcome screen. Contact your jurisdiction to be added to its account.

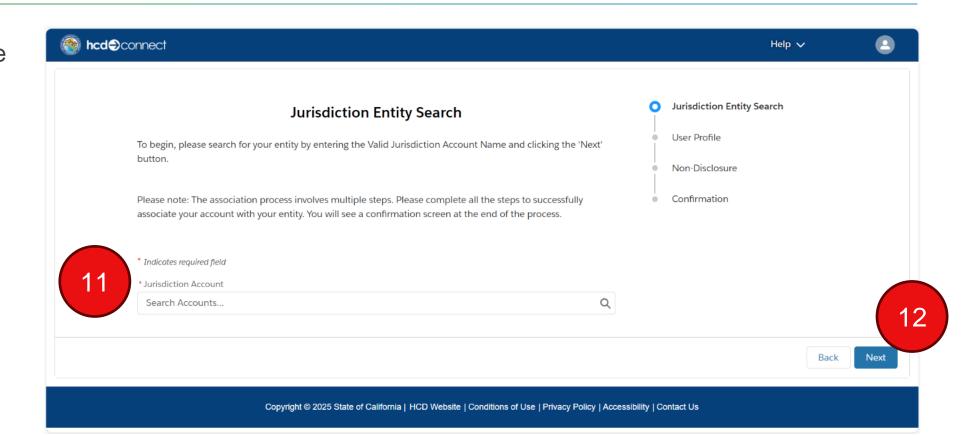


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11. Search for the name of the Jurisdiction Account Name and select the appropriate Jurisdiction Account.

12. Click "Next"





13. Enter required User Profile information.

14. Click Next.

	User Profile	
Please note: The association process involves multiple steps. Ple the end of the process.	ase complete all the steps to successfully associate your account with your entity. You will	see a confirmation screen at
* Indicates required field		
* First Name Nicki10101	Physical Address	
* Last Name Mont	* Physical Street 10101 W El Camino	Jurisdiction Entity Search
Suffix	Physical City	O User Profile
None	Sacramento	
Job Title	* Physical State	Non-Disclosure
	California	Confirmation
* Phone	Physical County	
555555555	Sacramento	4 *
* Email	* Physical Zip	
nicki.monteverde+10101@hcd.ca.gov	95833	
At least one option must be selected.	Physical Country	
Grants and Loans	United States	
	Mailing Address	
	Check if mailing address is different from physical address	



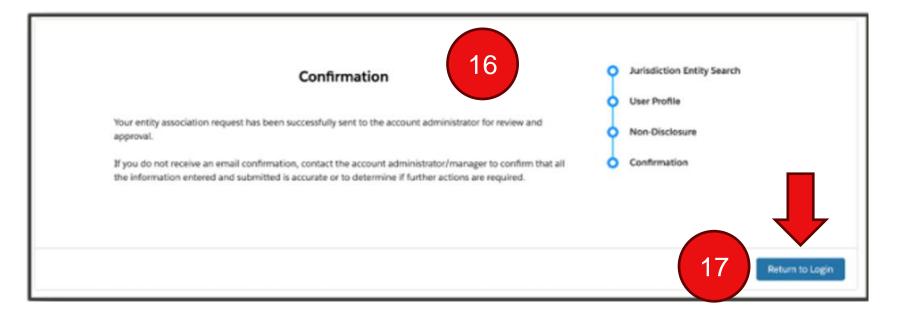
15. Complete the nondisclosure by reading the agreement, clicking the checkbox under "Legal Agreement," and clicking the **Agree** button.





16. At the end, you will see a confirmation screen for your Entity Association request.

#### 17. Click Return to Login.





# Receiving Access to a Jurisdiction Account

- Once you have completed registration, if a Primary Account User is already identified on the Account, the Primary Account User will be notified via email about your request. They can then grant access.
- If a Primary User is not already identified, an HCD rep will receive a notification of your request. The rep can then add you as the Primary Account (if applicable) or add you as a secondary user
- Once you are added to the Jurisdiction Account, you will gain access to submit Housing Elements, Annual Progress Reports, and/or Sites Inventories on behalf of the jurisdiction and you can see previous submissions.



# **Consultant Management**

HCD CONNECT USER PORTAL | Quick Reference Guide



- > If you are looking to bring on a Consultant to submit Housing Elements, Sites Inventory and Annual Progress Reports on behalf of your Jurisdiction, you can add them to your Account within the HCD Connect User Portal.
  - > Follow these steps within this guide to grant them access.



To add a Consultant to your Account, start by navigating to your **Entity Profile.** 

- 1. Click the User icon located on the top right of the screen.
- 2. Click on Entity Profile.

Note: This can only be done by the Primary Account.

	÷ 2	1
	User Profile	
2	Entity Profile	
Τ	Change Password	
	Log Out	
	Printable View	



Navigate to the **Consultant Manager** section of the Entity Profile screen.

3. Click Add Consultant

User Portal Entity Profile	
Primary New Account Approver          Rudy Testing       \$         * Account Type       \$         Jurisdiction       \$         * Entity Type       \$         Jurisdiction       \$         * Entity Type       \$         Rudy Entity Test       \$         * Profit Status       \$         Non Profit       \$	Tax ID Number   012345678   UEI Number   UEI Explration   UEI Status   UEI Status   -None   Mailing Address   Check If mailing address is different from physical address
* Physical Address	Website
1529 R St	Consultant Manager
*Physical City Sacramento	Add Consultant Consultant Name ~ 3



- Type in the Name of the Consultant in the Search Consultant field.
- Select the Consultant's name from the Select Consultant field.

	Add Consultant	
Search Consultant		
Select Consultant		
Select a Consultant		<b>v</b>
		Cancel Add

6. Click Add.

Add Consultant	Add Consultant
Search Consultant	Search Consultant
Christopher	Christopher Select Consultant
Select Consultant	Christopher Consultant chris.consultant.1107@yopmail.com
Select a Consultant 🔹	
	Cancel
Cancel Add	

- You will see the added consultant in the Consultant list.
- 8. Click Next to save.

hysical Address	Website		
Physical Street			
1529 R St	🖪 Consultant Manager		
Physical City	Add Consultant		
Sacramento	Consultant Name	~	
Physical State	Christopher Consultant	Fernove	
California			
Physical County			
Sacramento	: 7		
Physical Country			
United States			
Physical Zlp			
95811			
Phone			
1234567890			
Email			
idytest2000@yopmail.net			
			5

- The consultant will now have access to submit Housing Elements, APRs, and/or Sites Inventories. They can also access previous submissions.
- Please contact the consultant once they have been added to confirm access.



# Removing Consultant(s)

- 1. Click on the red **Remove** button next to the name of the consultant you want to remove.
- 2. You will receive a notification that the consultant was removed successfully. The consultant will no longer have access to your Jurisdiction Account

Physical Address				Wabsite			
* Physical Street							
1529 R St				🖪 Consultant Man	ager		
* Physical City				Add Consultant	_		
Sacramento				Consultant Name		~ ( <b>1</b>	
* Physical State				Christopher Consultant		Remove	
California							
				_			
🚳 hed@connect	Home		Success		× a da	My Tasks	
		2	Consultant removed success	nuny			
*Entity Type Jurisdiction							<b>#</b>
				UEI Status			
*Entity Name				None			:
Rudy Entity Test				Mailing Address			-

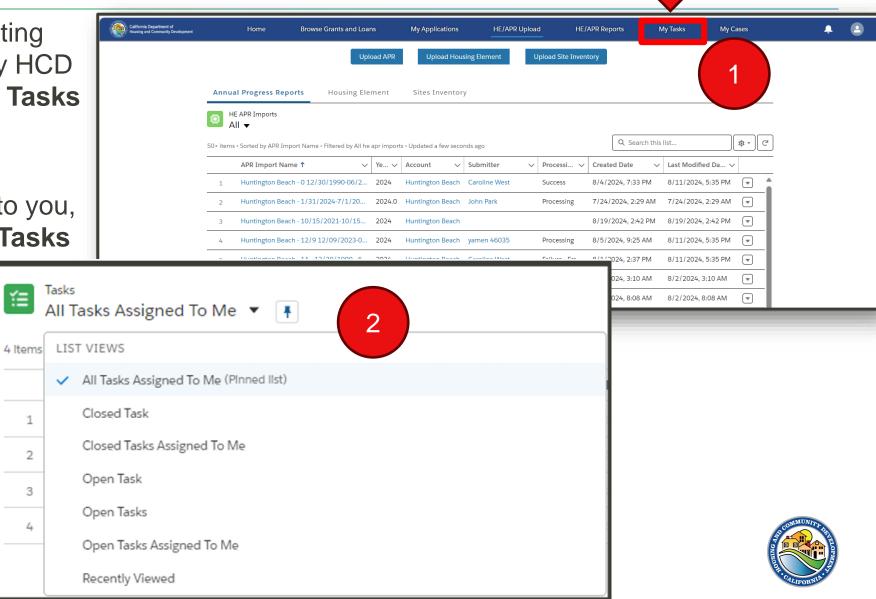
# Tasks

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# My Tasks

- 1. To view and update existing tasks assigned to you by HCD staff, navigate to the **My Tasks** tab
- 2. To view tasks assigned to you, use List Views and All Tasks Assigned To Me



#### Task Details

🛞 hed@connect Invest	e Grants and Loans	My Applications	My Awards M	Annage Centor				۰ ۵
Email: Your Housing Element has been s	uccessfully submitte	d				Ma	ark Complete	v Completed
Task Record Type Related To Action Plan JurDepAccount - 9/17/2024 - 10	0/11/2024						V	
View task det	ails					Related		
Task Information Subject Email: Your Housing Element has been successfully submittee	đ	/	Normal			Files (0)	1 Upload Files	AddTites
Due Date 9/25/2024 Comments		/	Status Complete Name		View/Add Files	/	Or drop files	
To rudytest2000(tyopmell.net CC: BCC: Attachment: -none-		/	Rudy Testing Jr		/			
Subject: Your Housing Element has been successfully submitt Body: Dear Budy Testing, Your Hisusing Element has been successfully submitted to HC If you require any assistance or have any questions, please en HousingElementhoffhod ca girx Thank you, California Department of Housing and Communit	co. nall HCD at							
✓ Task Assignment Autgred To			Related To					
O fludy Testing		/	JarOrghecount - 9/17/2026 -	- 10/11/2026	/			
✓ Reminder Beminder Set No reminder is set					/			
✓ System Information								
Consted By Party Testing, 9/25/2034, 3:30 PM			Let Modified By Budy Testing, 9125/2020	24, 3:30 PM				



# Portal Notifications

- 1. The Bell icon at the top of the page shows all your notifications. This is where you can also see any updates and tasks assigned to you.
- 2. To see more details, just click on any of the notification items.
- 3. You can also mark a notification item as read.

Notif	îcations	Mark all as read	×
1	Alex Morgan (HPD Staff) Housing Element - Supple Aug 5, 2024, 4:25 PM	assigned you a task mental Documentation needed	Î
-	Tom Jones (Super User) : Housing Element - Provide Aug 4, 2024, 2:10 PM	assigned you a task e supplemental documentation	
1	HETS APR Super User ass Housing Element Aug 2, 2024, 7:47 AM	igned you a task	
	HETS APR Super User ass Site Inventory Aug 1, 2024, 2:26 AM	igned you a task	-
2	HETS APR Super User ass Annual Progress Report Aug 1, 2024, 2:16 AM	igned you a task	



# Annual Progress Reports Submission

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# Submitting APR

1. From the **HE/APR Upload** tab, click the **Upload APR** button.

nia Department of and Community Development		Home	Browse Grants and .		My Applications	HE/APR Uploa	ad HE/	APR Reports	My Tasks	My Cases		÷
			U	pload APR	Upload Hou	ising Element	Upload Site Inven	ntory				
	Annu	al Progress Repo	rts Housing E	lement	Sites Inventor	ry						
	3 5 5	IE APR Imports									-	
	50+ item	s • Sorted by APR Impo	rt Name • Filtered by All h	ie apr import	ts • Updated a few seco	onds ago		Q Search thi	s list	¢ - C	]	
		APR Import Name	e 🕇 🔹 🔨	✓ Ye ∨	Account 🗸	Submitter 🗸	Processi 🗸	Created Date 🗸	Last Modified Da	∨	-	
	1	Huntington Beach	- 0 12/30/1990-06/2.	. 2024	Huntington Beach	Caroline West	Success	8/4/2024, 7:33 PM	8/11/2024, 5:35	PM 💌		
	2	Huntington Beach	- 1/31/2024-7/1/20	2024.0	Huntington Beach	John Park	Processing	7/24/2024, 2:29 AM	7/24/2024, 2:29	AM 💌		
	3	Huntington Beach	- 10/15/2021-10/15	2024	Huntington Beach			8/19/2024, 2:42 PM	8/19/2024, 2:42	PM 💌		
	4	Huntington Beach	- 12/9 12/09/2023-0.	. 2024	Huntington Beach	yamen 46035	Processing	8/5/2024, 9:25 AM	8/11/2024, 5:35	PM 💌		
	5	Huntington Beach	- 1A - 12/30/1990 - 6.	. 2024	Huntington Beach	Caroline West	Failure - Err	8/1/2024, 2:37 PM	8/11/2024, 5:35	PM 💌		
	6	Huntington Beach	- 1A - 12/30/1990 - 6.	. 2024	Huntington Beach			8/2/2024, 3:10 AM	8/2/2024, 3:10 A	AM 💌		
			- 1A - 12/30/1990 - 6.		Huntington Beach			8/2/2024, 8:08 AM	8/2/2024, 8:08 A	AM 💌		



2. Select appropriate **Jurisdiction** and **year.** 

3. Click Next.

HE APR Upload		
* Jurisdiction Select Jurisdiction Q	• Year 2024	
Alameda	]	
Alameda County		Next
Huntington Beach		
		Cancel



# Submitting APR

4. Select the appropriate planning period(s).

5. Click Next.

HE APR Upload
Period 1
٩
10/15/2021-10/15/2029
Previous Next
Cancel



# Submitting APR

6. Click <b>Upload Files</b> of drag and drop.	HE APR Upload Files for Huntington Beach - 6L 10/14/2021-10/14/2 Upload ① Upload Files Or drop files		
7. Once the green chec appears, click <b>Done.</b>	k	Previous Submit Cancel	
8. Click <b>Submit</b> .		Upload Files	
HE APR Upload		HuntingtonBeach_APR_2023_PASS.xlsm	Ø
Files for Huntington Beach - 6 [HuntingtonBeach_APR_2023 Upload	PASS.xlsm]	1 of 1 file uploaded	Done
① Upload Files Or dro			South MUNICIPE OF

9. You'll receive notification that file is processing.

10. Click Finish.

Finish
Cancel



## **APR Submission Email**

> You will receive an **email notification** that the file is currently being processed.

Subject: Your file is being processed	Email sample
Dear [User],	
Your file has been uploaded and is now being processed. This may take a few moments. You notification once the validation process is complete.	will receive a
Thank you,	
California Department of Housing and Community Development	



## **APR Submission Email**

- > You will be redirected to the HE APR Import record page where you can see the details of the file uploaded in the **Details** tab.
  - > The Processing Status indicates that the file is processing, and it takes up to 10 minutes for the system to process the file for all validations.

HE APR Import Huntington Beach - 6L 10/14/2021-10/14/2	
Detail	
✓ Processing Details	
APR Import Name Huntington Beach - 6L 10/14/2021-10/14/2	Submitted File HuntingtonBeach_APR_2023_PASS.xlsm
Submitter Subn Park	Error File
Processing Status Processing	
APR Import	
✓ Import Detail	
File Name	Year
[HuntingtonBeach_APR_2023_PASS.xlsm]	2024
	Last Modified By
	John Park, 8/11/2024, 5:26 PM
Conditions of Use   Privacy Policy	Accessibility Policy   Contact Us
Copyright © 2024	+ State of California



#### APR Error Email

- If there is an error with your APR, you will receive an email notification that will prompt you to navigate to the APR Import record and view the APR Error File.
- On that Import record, you can see that the processing status is now Failure – Errors and there is a URL link in the Error File that can be opened and downloaded to view.

Dear Kevan Rolfness,

Your Annual Progress Report encountered errors during processing that needs your attention. To review the specific errors and make necessary corrections, please access the error file available in the portal using the link below.

Link to Error File <u>https://hcd--</u> uat.sandbox.my.salesforce.com/sfc/servlet.shepherd/version/download/068cp000001C4DIAAK?operationContext=S1 [hcd---uat.sandbox.my.salesforce.com].

If you require any assistance or have any questions, please email HCD at APR@hcd.ca.gov.

Thank you,

California Department of Housing and Community Development



#### **APR Error Email**

Related <b>Details</b>				
✓ Processing Details				
Processing Status		 Submitter		
APR Import		 Submitted File		, di
		Processing Response		
		Error File		
✓ Review Details				
Primary Reviewer		 Senior Reviewer		
Primary Reviewer Commen	its:	 Senior Review Comments		Ń
Primary Review Date		 Senior Review Date		1
∨ Import Detail				
Account		 Year	2023	
Email		 Import Status Desc	Success	, di
File Name		 Owner	DataIntegration SA	<u>È</u>
APR Import Name	a2qcs00001bYqW			
Created By	A SANCHEZ, 3/28/2024, 1:14 PM			
Last Modified By	👌 DataIntegration SA, 10/31/2024, 4:42 PM			



#### HE/APR Upload Tab – Annual Progress Reports List View

- Click on any of the hyperlinks under HE APR Import column to open previous submissions of APR records.
- 2. Use the **search bar** to search for a previous submission.

	Linio	ad APR	Upload Hou	sing Element		pload Site Inven	tory				
			opiournou		0	pload site men	tory				
Annual Progress Re	Housing Elen	nent	Sites Inventor	y							
HE APR Imports											
	nport Name • Filtered by All he a	pr import	s • Updated a few seco	nds ago				۹ Search this I	ist		C
APR Import Na	ime↑ ~	Ye ∨	Account 🗸	Submitter	$\sim$	Processi 🗸	Created	Date 🗸	Last Modified Da	a 🗸	
1 Huntington Be	ach - 0 12/30/1990-06/2	2024	Huntington Beach	Caroline West		Success	8/4/202	4, 7:33 PM	8/11/2024, 5:35	5 PM 💌	•
2 Huntington Be	ach - 1/31/2024-7/1/20	2024.0	Huntington Beach	John Park		Processing	7/24/20	24, 2:29 AM	7/24/2024, 2:29	AM 💌	
3 Huntington Be	ach - 10/15/2021-10/15	2024	Huntington Beach				8/19/20	24, 2:42 PM	8/19/2024, 2:42	2 PM	
4 Huntington Be	ach - 12/9 12/09/2023-0	2024	Huntington Beach	yamen 46035		Processing	8/5/202	4, 9:25 AM	8/11/2024, 5:35	5 PM	
5 Huntington Be	ach - 1A - 12/30/1990 - 6	2024	Huntington Beach	Caroline West		Failure - Err	8/1/202	4, 2:37 PM	8/11/2024, 5:35	5 PM 💌	
6 Huntington Be	ach - 1A - 12/30/1990 - 6	2024	Huntington Beach				8/2/202	4, 3:10 AM	8/2/2024, 3:10	AM 💌	L
7 Huntington Po	ach - 1A - 12/30/1990 - 6	202/	Huntington Beach				8/2/202	4, 8:08 AM	8/2/2024, 8:08	AM 🔻	

- > A **list view** displays items in a vertical format, allowing you to quickly see and scroll through information.
- You can select between the All or Recently Viewed list view to curate a suitable view of APR records.



#### APR – Table D: Take Credit for Program Implementation!

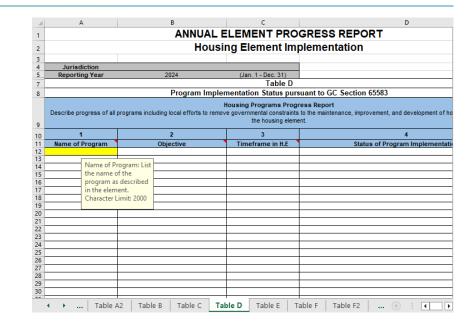
- HCD is proactively monitoring approved HEs with a focus on programs that were critical to why the HE was found in substantial compliance
- Submitting a complete and thorough Table D in the APR is important because we'll use the implementation status updates as the starting point for monitoring

	A		В	C	D					
1			ANNUAL	. ELEMENT PRO	OGRESS REPORT					
2	Housing Element Implementation									
3										
4	Jurisdiction									
5	Reporting Year		2024	(Jan. 1 - Dec. 31)						
7				Table D						
8			Program Imp	lementation Status put	rsuant to GC Section 65583					
9	Describe progress of all p	rograms inclu	uding local efforts to re	Housing Programs Prog move governmental constraint the housing elem	is to the maintenance, improvement, and development of he					
10	1		2	3	4					
11	Name of Program		Objective	Timeframe in H.E	Status of Program Implementati					
12										
13	Name of Pro	ogram: List								
14 15	the name of									
16	program as			<u> </u>						
17	in the eleme									
18	Character Li	mit: 2000								
19										
20										
21										
22										
23 24										
24 25										
26										
27										
28										
29										
30										



# Tips for Completing Table D

- Programs that include more than one objective should include status for each objective
- Include the status and progress of all programs, even programs due later and actions taken outside of the calendar year 2024
- When a program or objective is complete:
  - Include ordinance/resolution number that was adopted or other relevant documentation (with link, if possible)
  - Provide as much information as possible such as:
    - Number of units
    - Dates of approvals
    - Other information to demonstrate how program was completed





# Thank you!

HCD CONNECT USER PORTAL |

For questions and concerns about our new system, please email HCDConnectHPD@hcd.ca.gov

You may still submit APRs to HCD by emailing your APR to apr@hcd.ca.gov

