

HCD Connect for Local Governments

HCD CONNECT USER PORTAL | Quick Reference Guide





Learning Objectives

At the end of this module the learner will be able to:

- › Understand the purpose and features of the HCD Connect External User Portal
- › Complete the portal registration process successfully
- › Add / remove consultants from Jurisdiction Account
- › Submit Housing Element documentation
- › Submit Annual Progress Reports



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 [Portal URL](#) into your web browser. You will see the login screen home page.
2. Click **Create a New Account**.



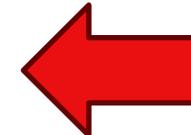
Username

Password

Log In

[Forgot your password?](#)

Not 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.

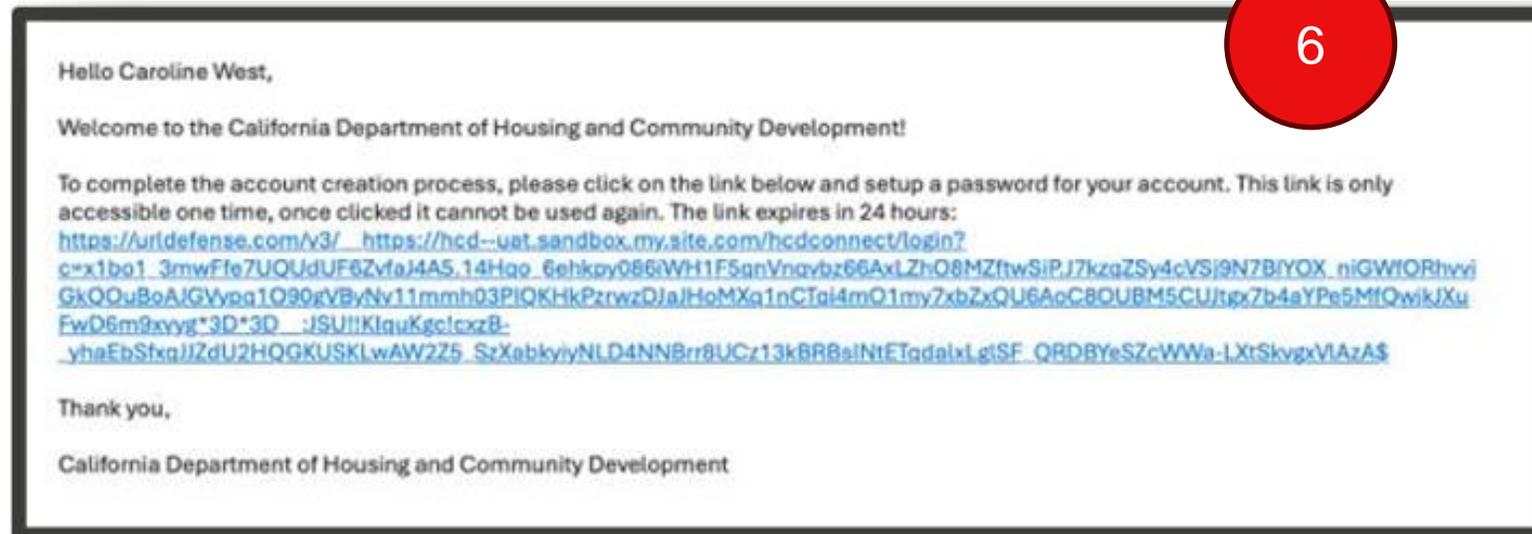
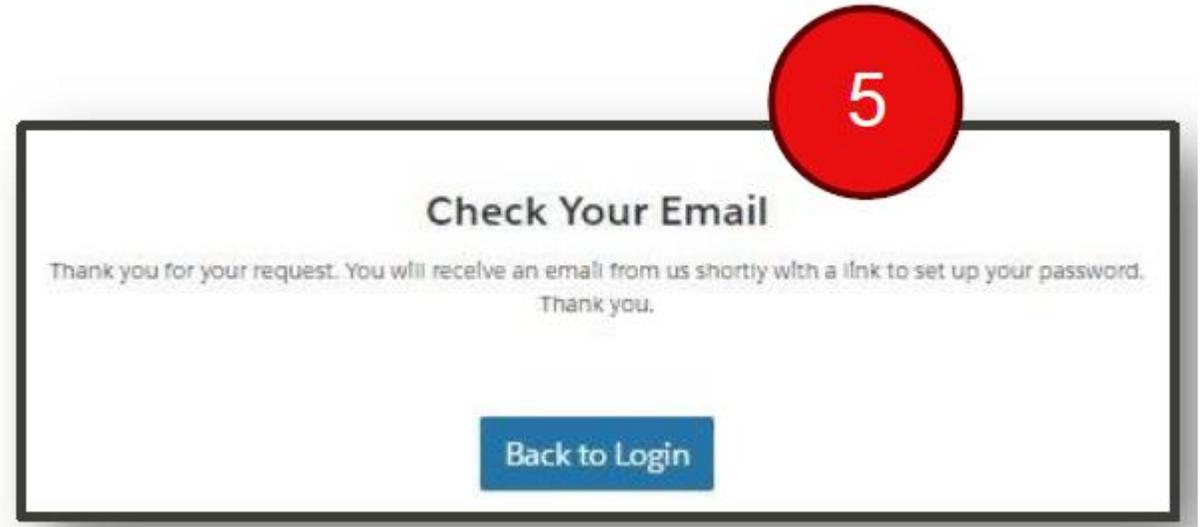
The image shows a registration form with the following fields and elements:

- First Name:** A text input field with a red circle '3' next to it.
- Last Name:** A text input field with a red circle '3' next to it.
- Email:** A text input field.
- Role Type:** A dropdown menu with the text 'Select Role Type' and a red circle '4' next to it. A red arrow points from this dropdown to a callout box.
- Callout Box:** A box titled '*Role Type' showing a dropdown menu with 'Select Role Type' and two options: 'Applicant' (highlighted with a red box) and 'Consultant'.
- Buttons:** A blue 'Register' button and a blue 'Already have an account?' button.



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.

Change Your Password

Enter a new password for `userguideuat1@yopmail.net`. Make sure to include at least:

- ✓ 8 characters
- ✓ 1 uppercase letter
- ✓ 1 lowercase letter
- ✓ 1 number
- ✓ 1 special character

New Password

Good

Confirm New Password

Match

[Change Password](#)



New User Registration – Jurisdiction Search

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.



The screenshot shows the HCD Connect User Portal interface. At the top left is the "hcdconnect" logo, and at the top right is a "Help" link and a user profile icon. The main content area features the word "Welcome!" in a large, stylized, cursive font. Below this, a message reads: "Congratulations, you have successfully registered as consultant user in the HCD Connect User Portal. Please, contact your entity to be added to the entity account." At the bottom of the page is a dark blue footer bar containing the text: "Copyright © 2024 State of California | HCD Website | Conditions of Use | Privacy Policy | Accessibility | Contact Us".



New User Registration – Jurisdiction Search

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

12. Click **Next**.

Jurisdiction Entity Search

To begin, please search for your entity by entering the Valid Jurisdiction Account Name and clicking the 'Next' button.

Please note: The association process involves multiple steps. Please complete all the steps to successfully associate your account with your entity. You will see a confirmation screen at the end of the process.

* Indicates required field
* Jurisdiction Account

Search Accounts...

Back Next

- Jurisdiction Entity Search
- User Profile
- Non-Disclosure
- Confirmation

12



New User Registration – Jurisdiction Search

13. Enter required User Profile information.

14. Click **Next**.

User Profile

Please note: The association process involves multiple steps. Please complete all the steps to successfully associate your account with your entity. You will see a confirmation screen at the end of the process.

** Indicates required field*

* First Name
Caroline

* Last Name
West

Suffix
--None--

Job Title

* Phone

* Email
caroline.west@hcd.ca.gov

Physical Address

* Physical Street

* Physical City

* Physical State
--None--

* Physical Zip

* Physical Country
United States

Mailing Address

Check if mailing address is different from physical address

Back **Next**

13

14

- Jurisdiction Entity Search
- User Profile**
- Non-Disclosure
- Confirmation



New User Registration – Jurisdiction Search

15. Complete the non-disclosure by reading the agreement, clicking the checkbox under “Legal Agreement,” and clicking the **Agree** button.



The screenshot shows the 'Non - Disclosure' page on the hcdconnect website. A red circle with the number '15' is positioned on the left side of the page. A red arrow points to the 'Legal Agreement' section, which contains a checkbox and the text: 'I have read the agreement above and I agree with the terms and conditions.' Another red arrow points to the 'Agree' button at the bottom right of the page. The page content includes a 'Non - Disclosure' heading, a 'Please Note' section, and several paragraphs of terms and conditions. The footer contains copyright information for the State of California, HCD, and various policies.

hcdconnect

Non - Disclosure

Please review the below terms of use carefully and confirm your acknowledgment.
Please Note: The account association process involves multiple steps. Please complete all of the steps to successfully associate your account with your entity. You will see a confirmation screen at the end of the process.

By submitting this registration form, I, the Applicant or its authorized representative applying hereunder, hereby certify, consent, and agree to all of the following terms and conditions of use. Terms marked with an asterisk are required:

*I certify that I am an authorized user of this account and I am accessing this account for an authorized purpose.
*I certify that I have full authority to act on behalf of my organization to initiate, complete, sign, and submit, as appropriate, reports, housing statements, documents, and applications for funding through the Department of Housing and Community Development.
*I certify to the best of my knowledge and belief that all information I am providing to the California Department of Housing and Community Development (HCD) is true, accurate, and complete. If requested, I will provide HCD further documentation to verify the information I have provided. I will promptly notify HCD if I become aware that any material information submitted has changed.
*I give consent/authorization to HCD and its respective agents, employees, contractors, and assigns, to immediately share, disclose, analyze, and discuss, with any other person or entity, public or private, all documents and other information submitted as necessary to verify the information provided, determine eligibility for funding, evaluate and effectively implement the funding program, and conduct or comply with state or federal audits of the applicant or program.
*I will not disclose my login and password to anyone else. If I am emailed a link to this account, I will confirm the sender's identity and sending page domain name ("http://s.s.gov") before logging on. I will log out of this account when I leave my computer unattended.
*I understand that for funding applications, HCD will not give applicants extra time to resolve technical issues caused by incompatible browsers, operating systems, or incompatible use of this account. I understand that HCD may not discover deficiencies caused by compatibility issues until the submission deadline has already passed.
(Optional) I agree to participate in the evaluation of this program, which will help improve HCD's service delivery and potentially expand resources for rent support and affordable housing. This may involve filling out follow-up surveys. (Note: Your willingness to be contacted for program evaluation purposes will not affect your eligibility or selection for this program in any way.)
*By checking the "Agree" box below, I agree to associate these certifications electronically, and intend my electronic signature to have the same binding effect as myself and my organization as a physical or "wet" signature.
We do not need this consent for housing statements as we have the statutory authority to do so.
Not applicable for housing statements.

Legal Agreement

I have read the agreement above and I agree with the terms and conditions.

Next Agree

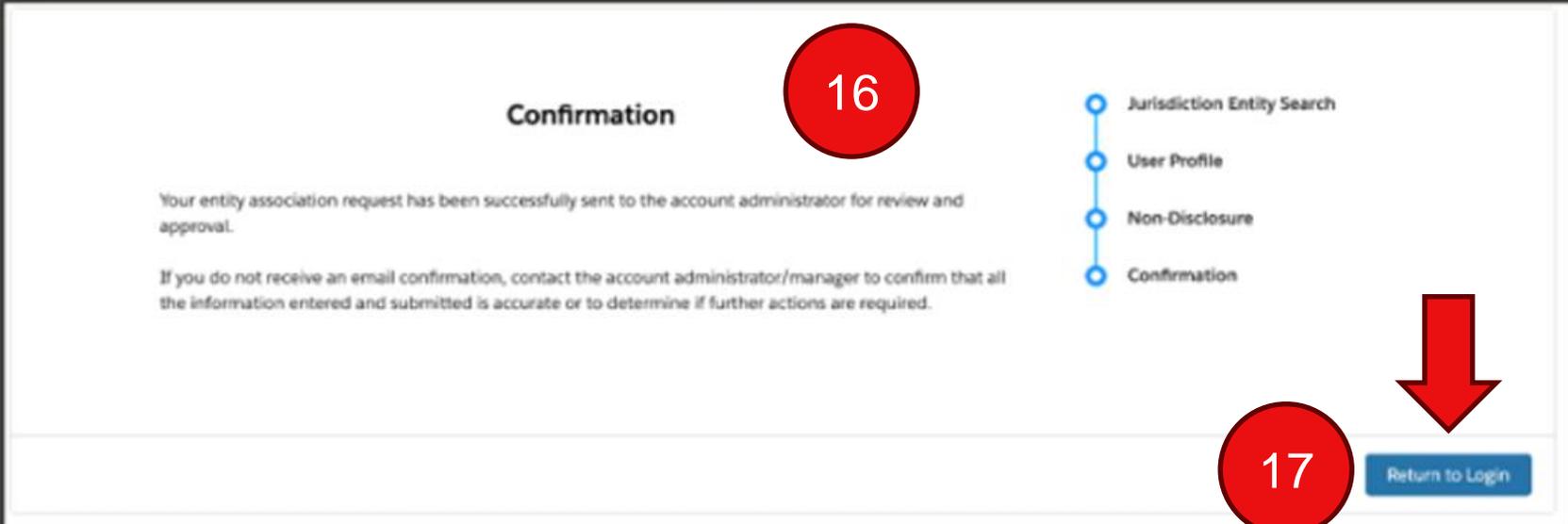
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New User Registration – Jurisdiction Search

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

17. Click **Return to Login**.



The screenshot shows a confirmation screen with the following content:

- Confirmation** (highlighted with a red circle labeled 16)
- Text: "Your entity association request has been successfully sent to the account administrator for review and approval."
- Text: "If you do not receive an email confirmation, contact the account administrator/manager to confirm that all the information entered and submitted is accurate or to determine if further actions are required."
- Progress indicator on the right with four steps: "Jurisdiction Entity Search", "User Profile", "Non-Disclosure", and "Confirmation". The "Confirmation" step is highlighted with a blue circle.
- A red arrow points to a blue button labeled "Return to Login" (highlighted with a red circle labeled 17).



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



Adding Consultant(s) to Jurisdiction

- 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.

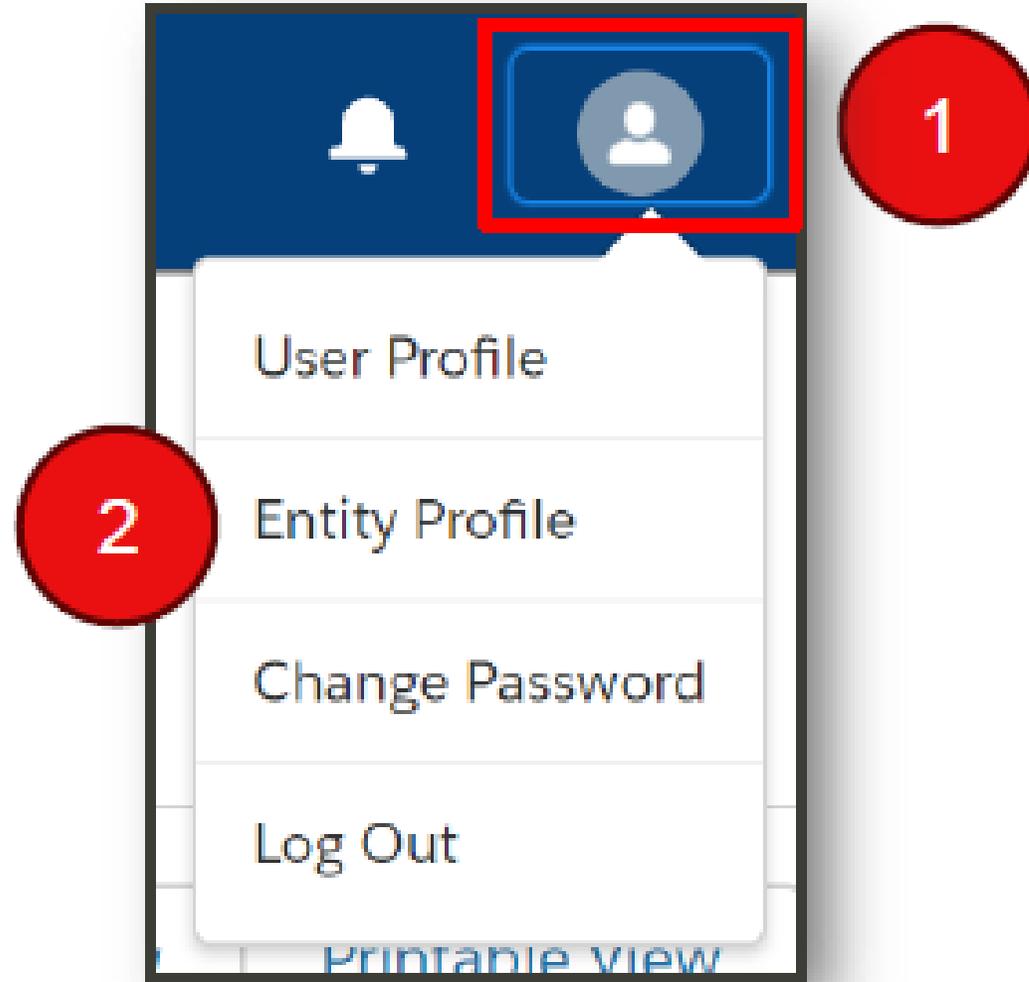


Adding Consultant(s) to Jurisdiction

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**.

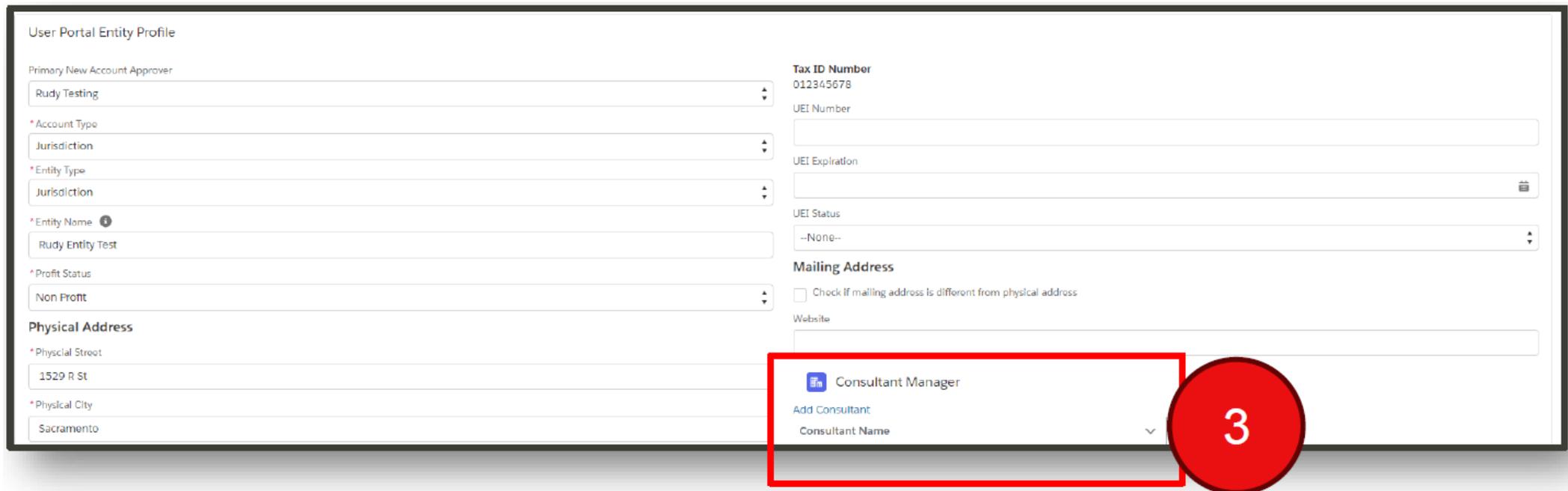
Note: This can only be done by the Primary Account.



Adding Consultant(s) to Jurisdiction

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

3. Click **Add Consultant**



The screenshot shows the 'User Portal Entity Profile' form. The form is divided into several sections: 'Primary New Account Approver' (Rudy Testing), 'Account Type' (Jurisdiction), 'Entity Type' (Jurisdiction), 'Entity Name' (Rudy Entity Test), 'Profit Status' (Non Profit), 'Physical Address' (1529 R St, Sacramento), 'Tax ID Number' (012345678), 'UEI Number', 'UEI Expiration', 'UEI Status' (-None-), 'Mailing Address' (with a checkbox for 'Check if mailing address is different from physical address'), and 'Website'. A red box highlights the 'Add Consultant' button in the 'Consultant Manager' section. A red circle with the number '3' is overlaid on the button.

User Portal Entity Profile

Primary New Account Approver
Rudy Testing

*Account Type
Jurisdiction

*Entity Type
Jurisdiction

*Entity Name ⓘ
Rudy Entity Test

*Profit Status
Non Profit

Physical Address
*Physical Street
1529 R St
*Physical City
Sacramento

Tax ID Number
012345678

UEI Number

UEI Expiration

UEI Status
--None--

Mailing Address
 Check if mailing address is different from physical address
Website

Consultant Manager
Add Consultant
Consultant Name

3



Adding Consultant(s) to Jurisdiction

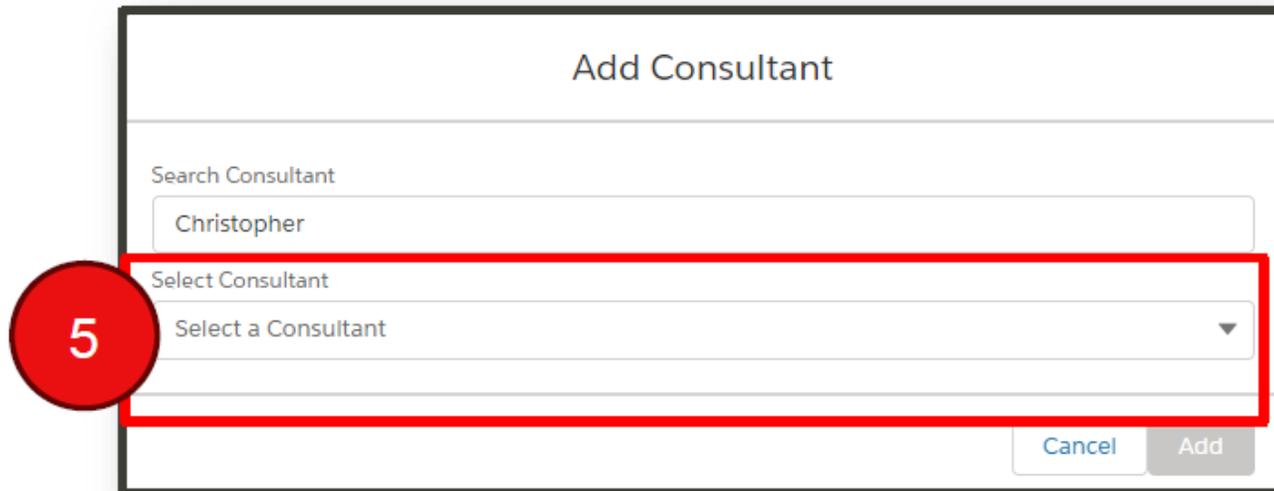
4. Type in the Name of the Consultant in the **Search Consultant** field.

5. Select the Consultant's name from the **Select Consultant** field.

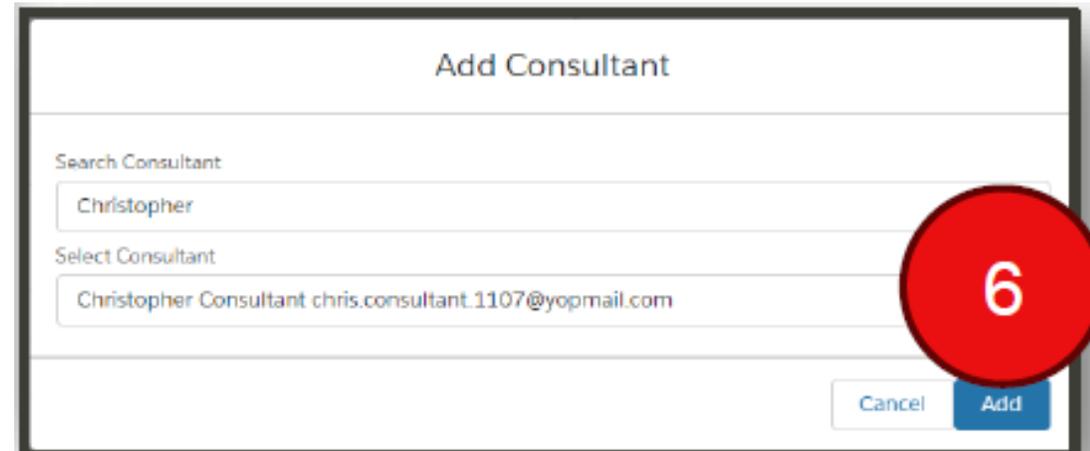
6. Click **Add**.



The screenshot shows the 'Add Consultant' form. A red circle with the number '4' is positioned over the 'Search Consultant' text input field, which is currently empty. Below it is a 'Select Consultant' dropdown menu with the placeholder text 'Select a Consultant'. At the bottom right, there are 'Cancel' and 'Add' buttons.



The screenshot shows the 'Add Consultant' form. A red circle with the number '5' is positioned over the 'Select Consultant' dropdown menu. The dropdown is open, showing a list of consultants. The first option, 'Christopher', is highlighted with a red box. The 'Search Consultant' field above contains the text 'Christopher'. At the bottom right, there are 'Cancel' and 'Add' buttons.



The screenshot shows the 'Add Consultant' form. A red circle with the number '6' is positioned over the 'Add' button. The 'Search Consultant' field contains 'Christopher' and the 'Select Consultant' dropdown is open, showing 'Christopher Consultant chris.consultant.1107@yopmail.com' selected. At the bottom right, there are 'Cancel' and 'Add' buttons.

Adding Consultant(s) to Jurisdiction

7. You will see the added consultant in the Consultant list.

8. Click **Next** to save.

Physical Address

* Physical Street
1520 R St

* Physical City
Sacramento

* Physical State
California

* Physical County
Sacramento

* Physical Country
United States

* Physical Zip
95811

* Phone
1234567890

* Email
rucytest2090@yopmail.net

Website

Consultant Manager

Add Consultant

Consultant Name

Christopher Consultant Remove

7

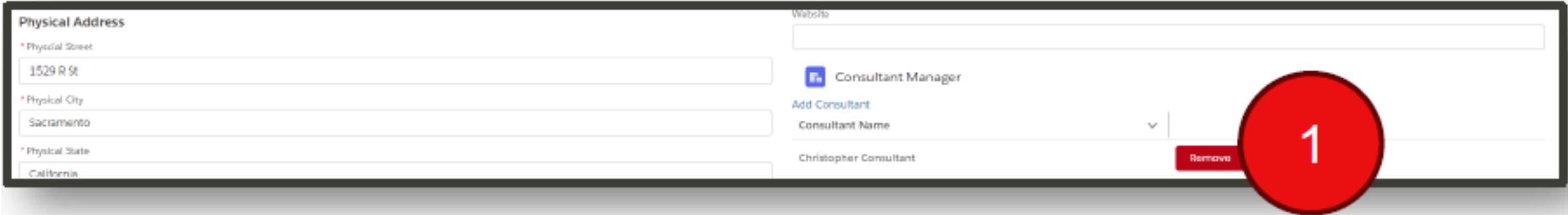
8

- 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

* Physical Street
1529 R St

* Physical City
Sacramento

* Physical State
California

Website

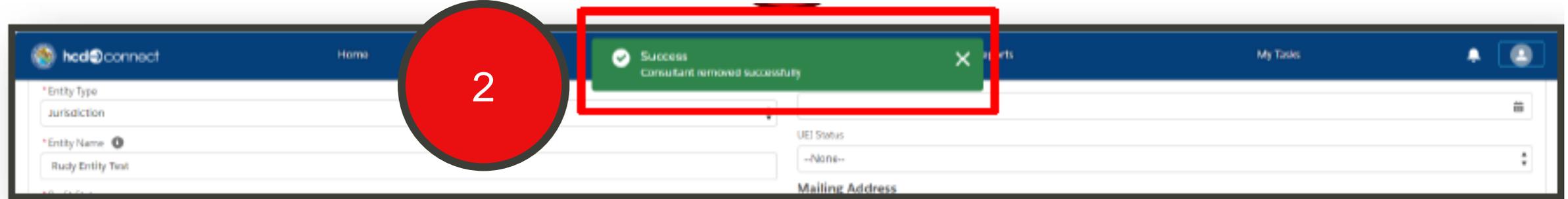
Consultant Manager

Add Consultant

Consultant Name
Christopher Consultant

Remove

1



hcdconnect Home My Tasks

* Entity Type
Jurisdiction

* Entity Name
Rudy Entity Test

UEI Status
--None--

Mailing Address

Success
consultant removed successfully

2

Tasks

HCD CONNECT USER PORTAL | Quick Reference Guide



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**

California Department of Housing and Community Development

Home Browse Grants and Loans My Applications HE/APR Upload HE/APR Reports **My Tasks** My Cases

Upload APR Upload Housing Element Upload Site Inventory

Annual Progress Reports Housing Element Sites Inventory

HE APR Imports All

50+ Items • Sorted by APR Import Name • Filtered by All he apr imports • Updated a few seconds ago

Search this list...

	APR Import Name ↑	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 - 11 11/30/2023-6...	2024	Huntington Beach	Caroline West	Failed	8/11/2024, 2:37 PM	8/11/2024, 5:35 PM	
6	Huntington Beach - 11 11/30/2023-6...	2024	Huntington Beach	Caroline West	Failed	8/11/2024, 3:10 AM	8/2/2024, 3:10 AM	
7	Huntington Beach - 11 11/30/2023-6...	2024	Huntington Beach	Caroline West	Failed	8/2/2024, 8:08 AM	8/2/2024, 8:08 AM	

Tasks

All Tasks Assigned To Me

4 Items

LIST VIEWS

- ✓ All Tasks Assigned To Me (Pinned list)
- 1 Closed Task
- 2 Closed Tasks Assigned To Me
- 3 Open Task
- 4 Open Tasks
- Open Tasks Assigned To Me
- Recently Viewed



Task Details

The screenshot shows the 'Task Details' page in the hcdconnect system. The page title is 'Task: Email: Your Housing Element has been successfully submitted'. The task record type is 'Action Plan' and it is related to 'JurOrgAccount - 9/17/2024 - 10/11/2024'. The 'Details' section is expanded, showing 'Task Information' with fields for Subject, Due Date, Comments, Priority, Status, Name, and Assignee. The 'Related' section shows a 'Files (0)' area with an 'Add Files' button and an 'Upload Files' button. A 'Completed' button is visible in the top right corner. Three red arrows highlight specific features: 'View task details' points to the 'Details' tab, 'View/Add Files' points to the 'Files (0)' section, and 'Mark Complete' points to the 'Completed' button.

hcdconnect

Browse Grants and Loans My Applications My Awards Message Center

Task
Email: Your Housing Element has been successfully submitted

Task Record Type: Action Plan Related To: JurOrgAccount - 9/17/2024 - 10/11/2024

Completed

Details

View task details

Task Information

Subject	Priority
Email: Your Housing Element has been successfully submitted	Normal
Due Date	Status
9/25/2024	Complete
Comments	Name
To: rudytst2000@yopmail.net	Rudy Testing, Jr
CC:	
BCC:	
Attachment: --none--	

Subject: Your Housing Element has been successfully submitted
Body:
Dear Rudy Testing,
Your Housing Element has been successfully submitted to HCD.
If you require any assistance or have any questions, please email HCD at HousingElement@hcd.ca.gov
Thank you, California Department of Housing and Community Development.

Task Assignment

Assigned To	Related To
Rudy Testing	JurOrgAccount - 9/17/2024 - 10/11/2024

Reminder

Reminder Set
No reminder is set

System Information

Created By	Last Modified By
Rudy Testing, 9/25/2024, 3:30 PM	Rudy Testing, 9/25/2024, 3:30 PM

View/Add Files

Related

Files (0) Add Files

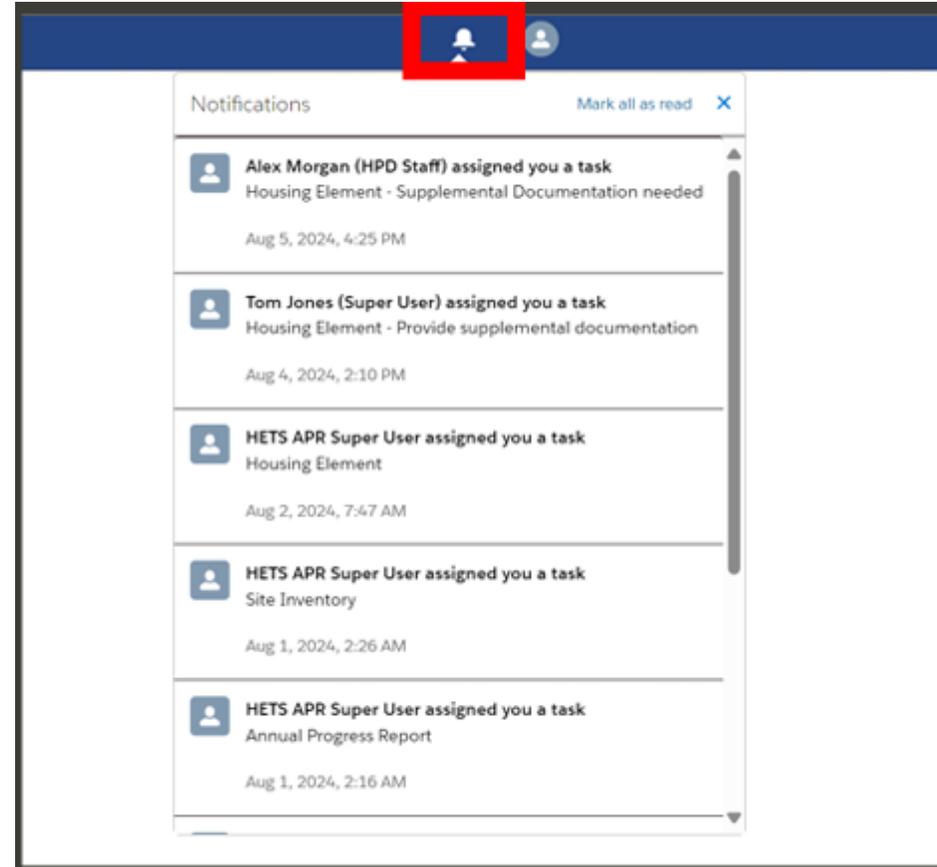
Upload Files

Or drop files



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.



HCD CONNECT



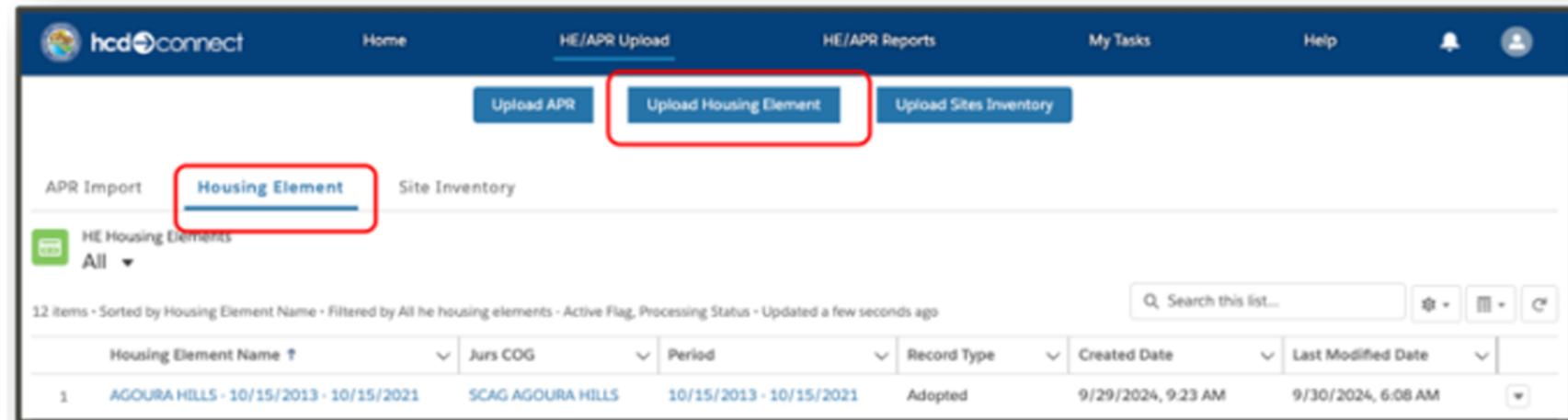
Housing Element Submission

Submit a HE on Behalf of a Jurisdiction



Submit a Housing Element on Behalf of a Jurisdiction

1. Click on the **HE/APR Upload** tab and the **Upload Housing Element** button.

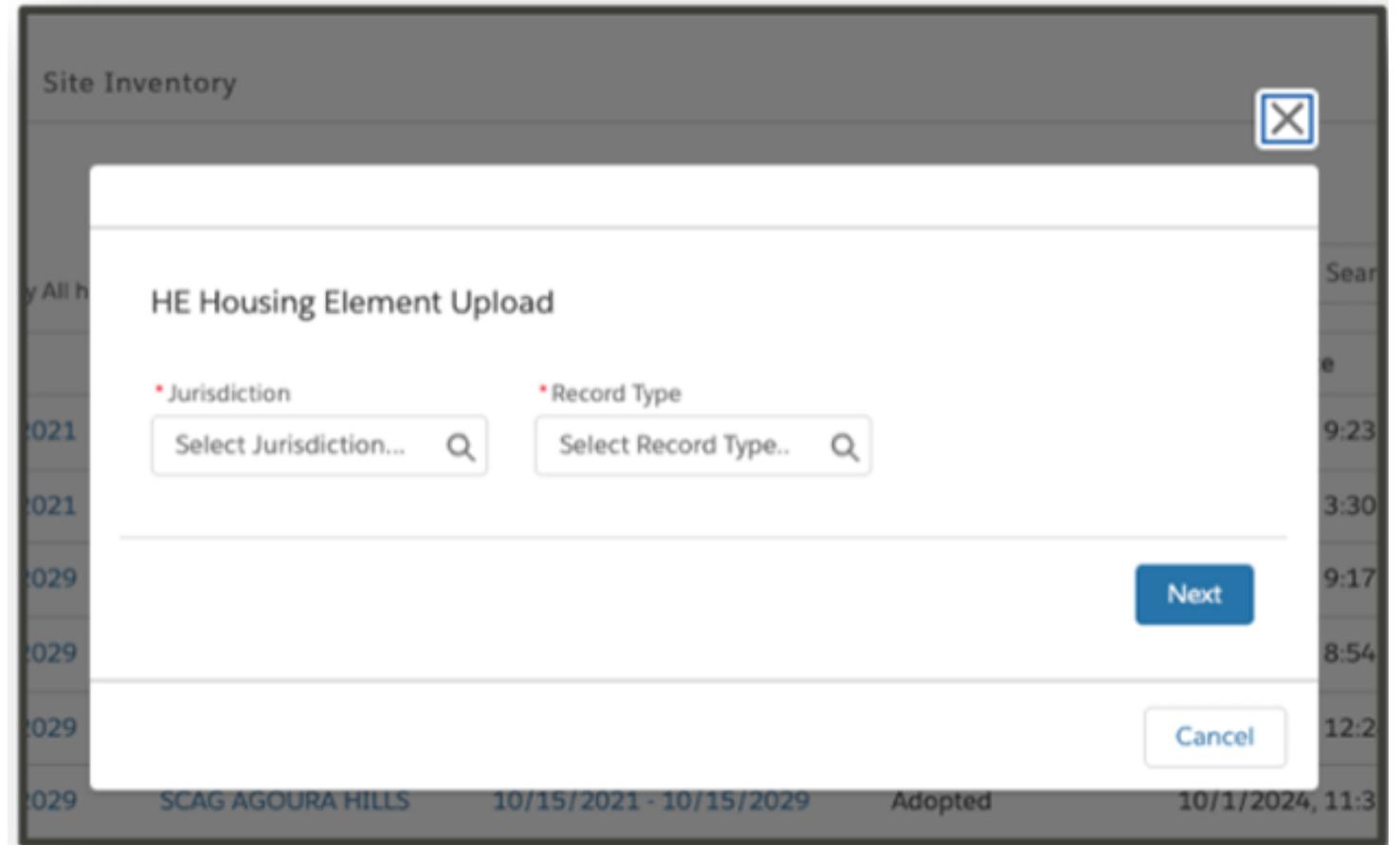


Submit a Housing Element on Behalf of a Jurisdiction

2. The **HE Housing Element Upload** component will appear.

3. Select the appropriate **Jurisdiction**.

Consultants will be able to choose from a list of jurisdictions with which they are associated



The screenshot shows a 'Site Inventory' window with a modal titled 'HE Housing Element Upload'. The modal contains two required fields: 'Jurisdiction' and 'Record Type', each with a search icon. Below the fields are 'Next' and 'Cancel' buttons. The background shows a table with columns for jurisdiction, dates, and status.

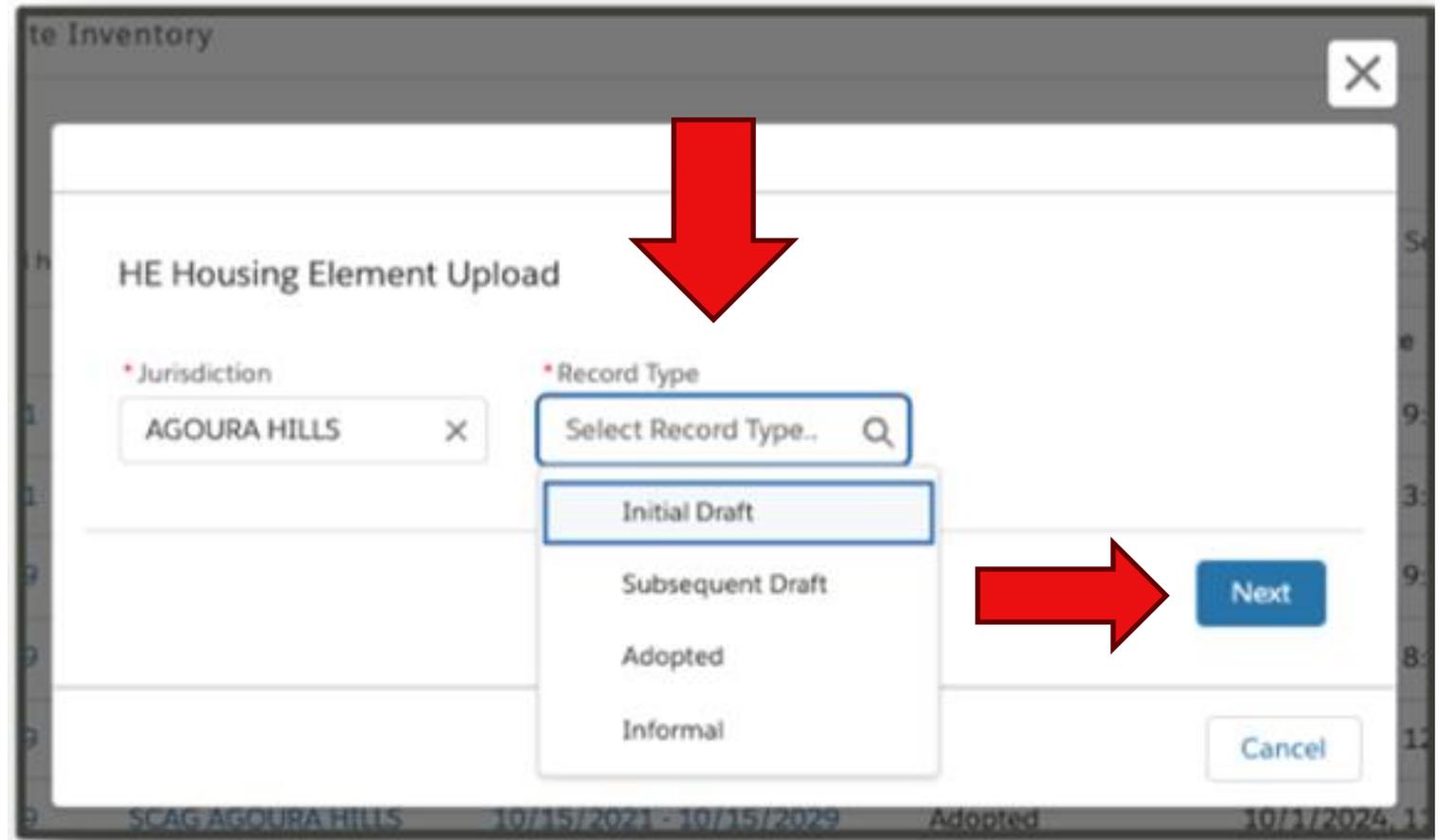
Jurisdiction	Start Date	End Date	Status	Time
021				9-23
021				3:30
029				9-17
029				8-54
029				12-2
029	SCAG AGOURA HILLS	10/15/2021 - 10/15/2029	Adopted	10/1/2024, 11:3



Submit a Housing Element on Behalf of a Jurisdiction

4. Select the appropriate type of submission in the **Record Type** field.

5. Click **Next**.



The screenshot shows a web application window titled "te Inventory" with a close button in the top right. The main content area is titled "HE Housing Element Upload". There are two required fields: "Jurisdiction" and "Record Type". The "Jurisdiction" field contains "AGOURA HILLS" with a clear button (X). The "Record Type" field is a dropdown menu that is currently open, showing four options: "Initial Draft", "Subsequent Draft", "Adopted", and "Informal". A red arrow points down to the "Record Type" field, and another red arrow points right to the "Next" button. Below the form, there is a table with the following data:

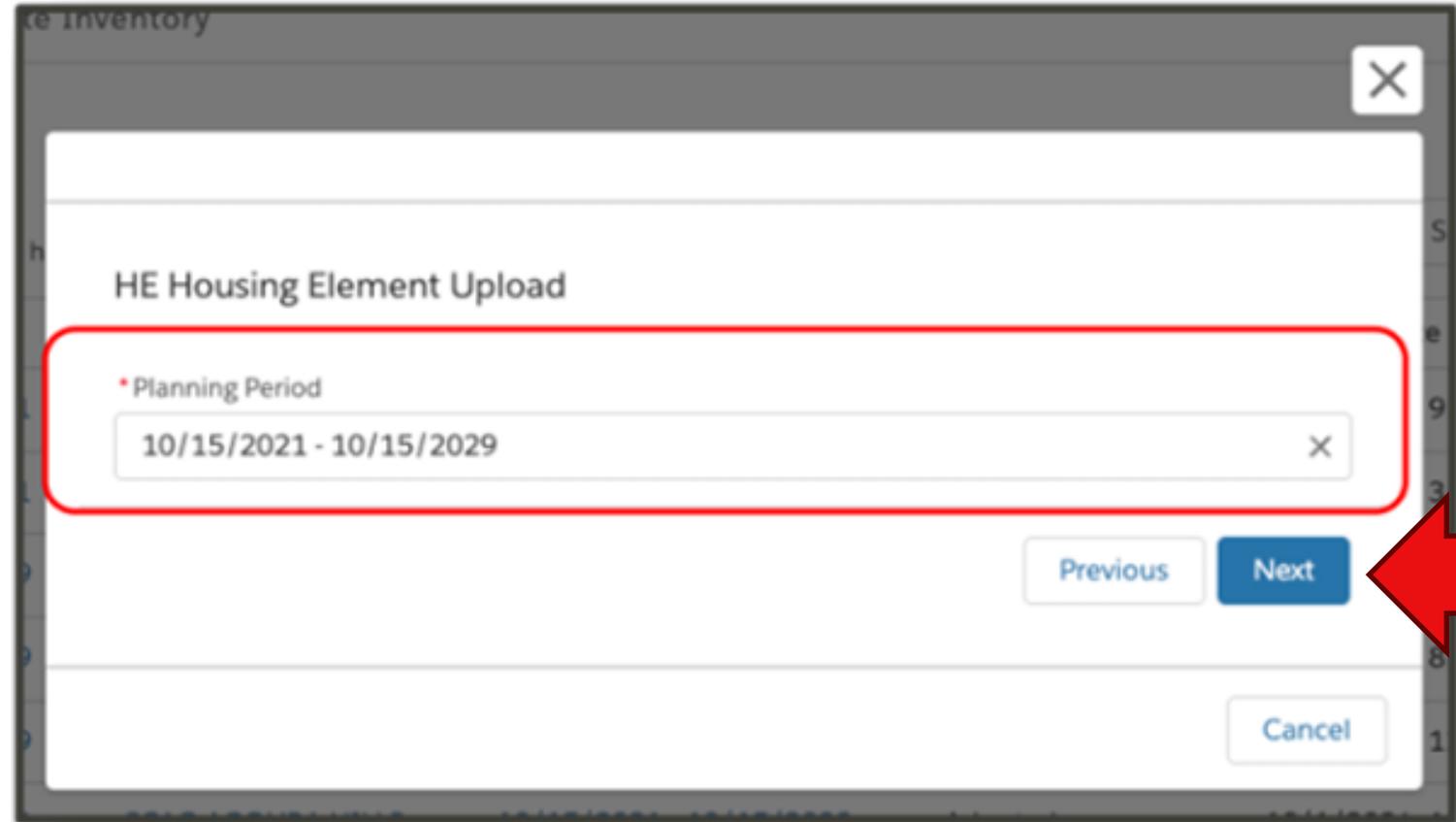
Jurisdiction	Start Date	End Date	Status	Expiration Date
SCAG AGOURA HILLS	10/15/2021	10/15/2029	Adopted	10/1/2024, 1



Submit a Housing Element on Behalf of a Jurisdiction

6. Click into the Planning Period field and select the appropriate planning period by clicking on your selection.

7. Click **Next**.



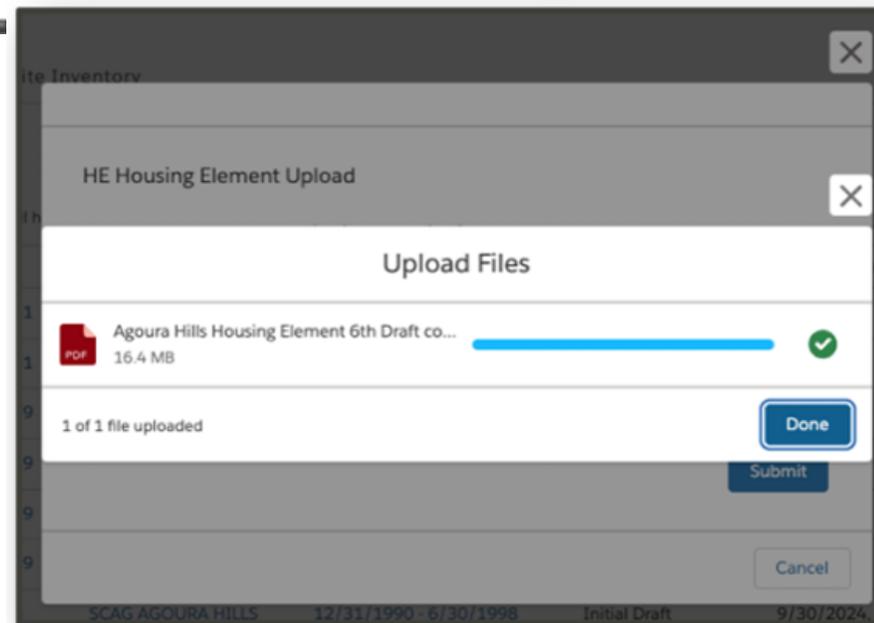
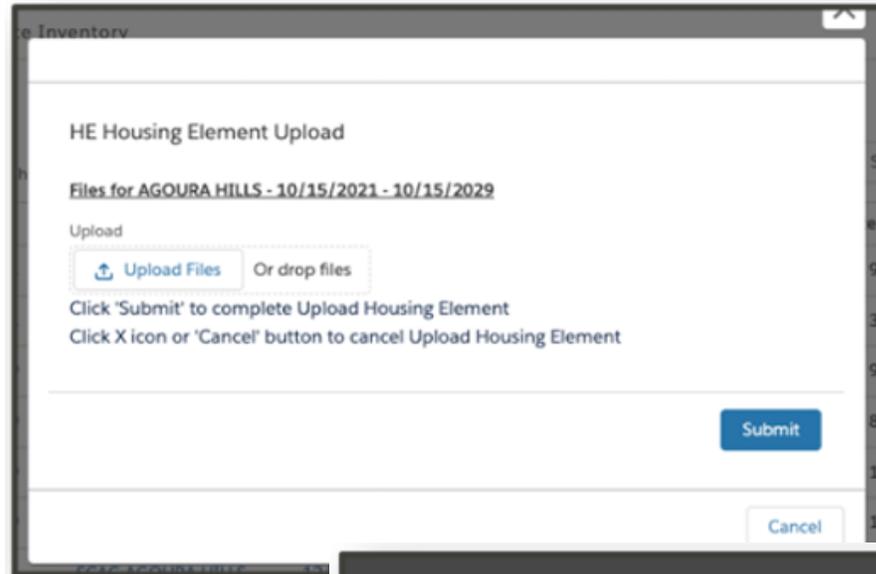
The screenshot shows a web form titled "HE Housing Element Upload" within a window labeled "Inventory". The form has a "Planning Period" field containing the date range "10/15/2021 - 10/15/2029". This field is highlighted with a red rounded rectangle. Below the field are three buttons: "Previous", "Next", and "Cancel". The "Next" button is highlighted with a red arrow pointing to it from the right. The "Previous" button is disabled (greyed out), and the "Cancel" button is also disabled (greyed out).



Submit a Housing Element on Behalf of a Jurisdiction

8. Click on **Upload Files** or **drag and drop files**.

9. You will see the process of your file upload. Once you see the green checkmark, click **Done**.

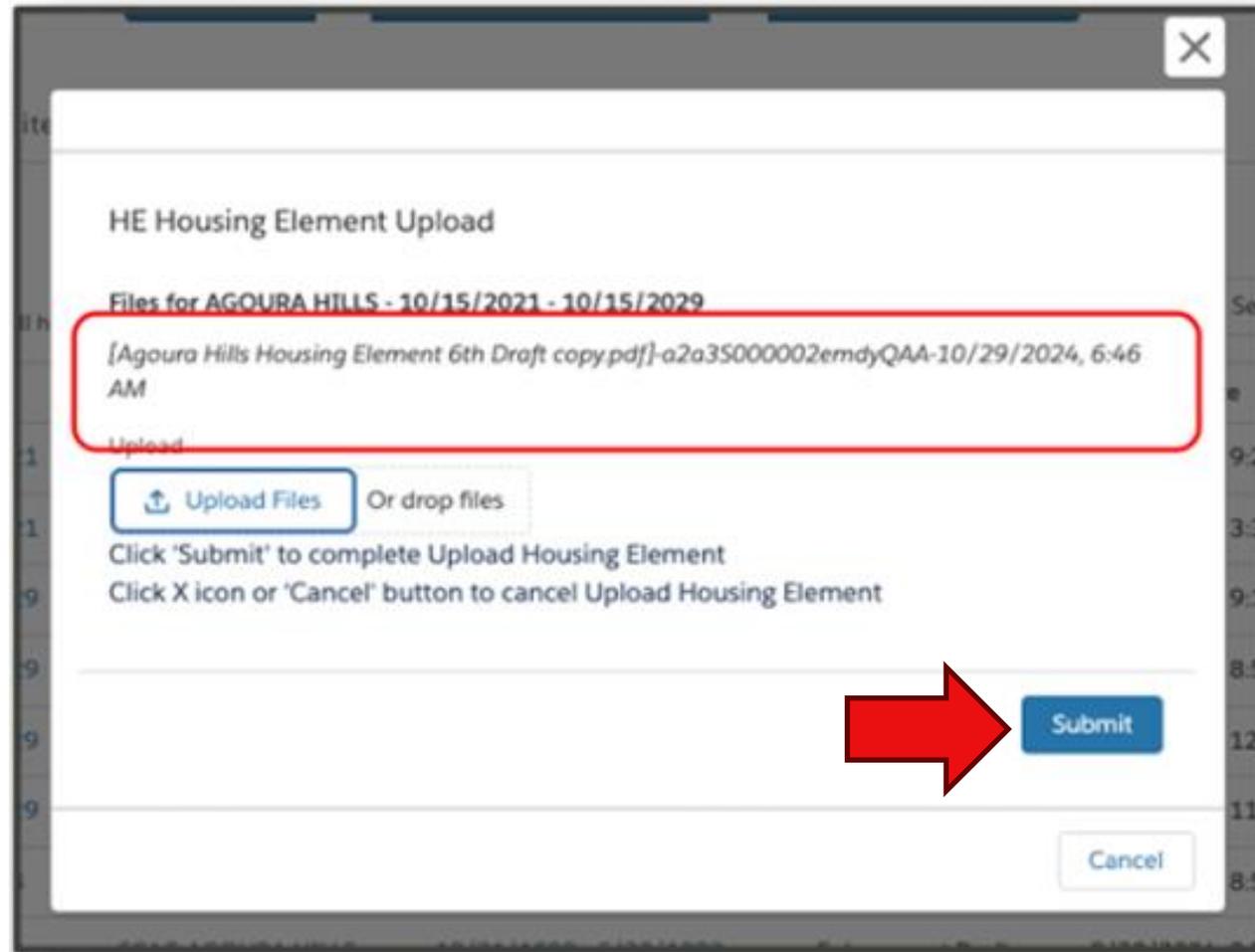


Submit a Housing Element on Behalf of a Jurisdiction

10. You will navigate back to the HE Housing Element Upload screen and you will see the file you uploaded.

11. Click **Submit**

IMPORTANT: If you have uploaded the wrong file by mistake you cannot remove it. Click **Cancel** and restart the process



The screenshot shows a web interface for uploading a Housing Element. The title is "HE Housing Element Upload". Below the title, it says "Files for AGOURA HILLS - 10/15/2021 - 10/15/2029". A file name "[Agoura Hills Housing Element 6th Draft copy.pdf]-a2a35000002emdyQAA-10/29/2024, 6:46 AM" is listed and highlighted with a red box. Below the file list, there is an "Upload" button with an upload icon and the text "Upload Files" and "Or drop files". Below the upload button, there is a "Submit" button and a "Cancel" button. A red arrow points to the "Submit" button. The interface also includes instructions: "Click 'Submit' to complete Upload Housing Element" and "Click X icon or 'Cancel' button to cancel Upload Housing Element".

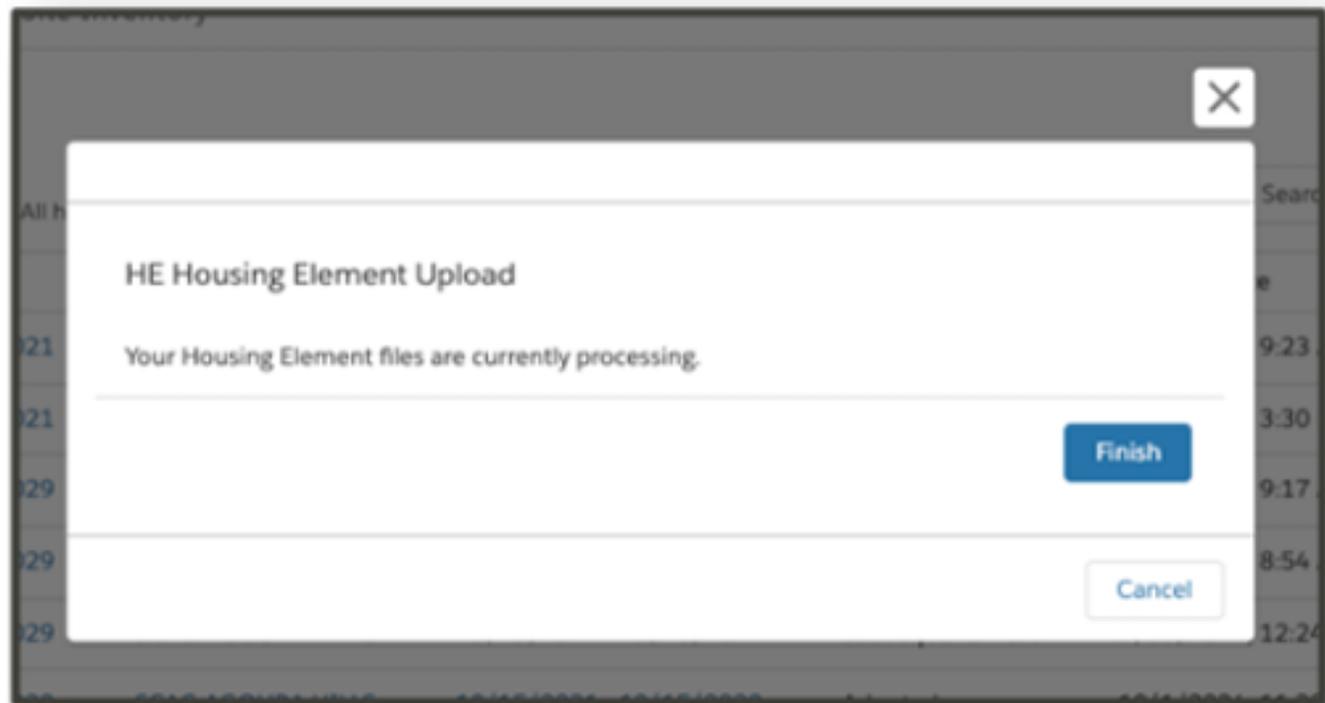


Submit a Housing Element on Behalf of a Jurisdiction

12. You will see the processing screen indicating that “Your Housing Element files are currently processing”

13. Click the **Finish** button to complete the upload process.

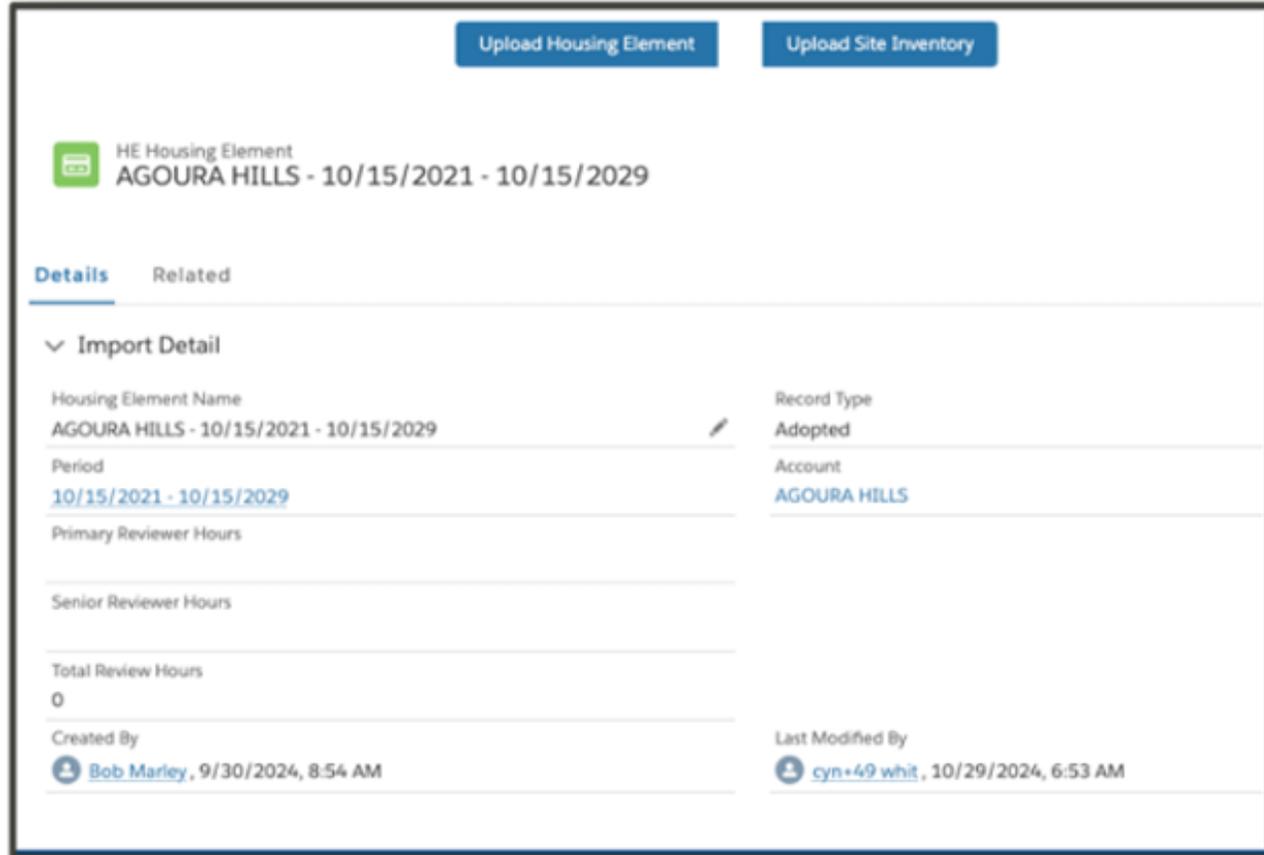
This means you have successfully uploaded your Housing Element file and created a HE record. The system is currently sharing this document to the public dashboard.



Submit a Housing Element on Behalf of a Jurisdiction

1. Once you complete your upload, you will be redirected to the **Housing Element record** page.

2. You will be able to see details of the file uploaded in the **Details** tab.

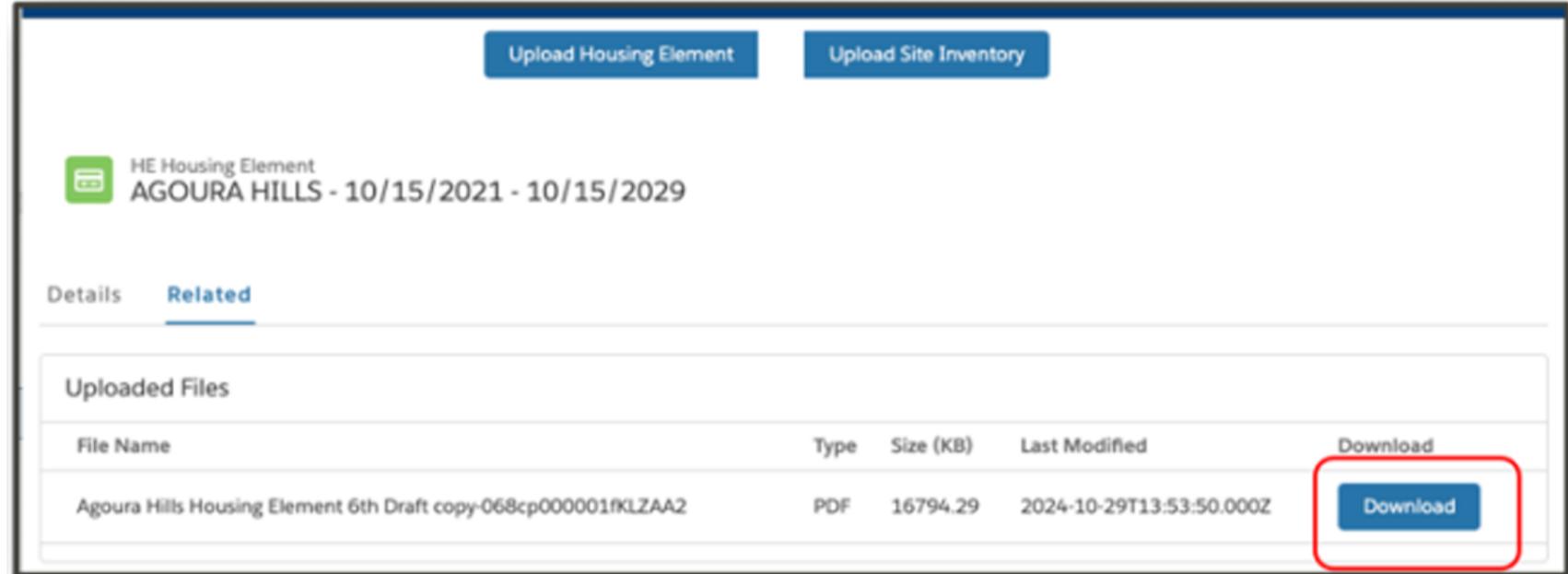


The screenshot displays a web interface for managing housing elements. At the top, there are two blue buttons: "Upload Housing Element" and "Upload Site Inventory". Below these is a header section with a green icon and the text "HE Housing Element AGOURA HILLS - 10/15/2021 - 10/15/2029". The main content area is divided into two tabs: "Details" (selected) and "Related". Under the "Details" tab, there is a section titled "Import Detail" with a dropdown arrow. This section contains several fields: "Housing Element Name" (AGOURA HILLS - 10/15/2021 - 10/15/2029), "Period" (10/15/2021 - 10/15/2029), "Primary Reviewer Hours", "Senior Reviewer Hours", and "Total Review Hours" (0). To the right of these fields, there are two columns: "Record Type" (Adopted) and "Account" (AGOURA HILLS). At the bottom, there are two fields: "Created By" (Bob Marley, 9/30/2024, 8:54 AM) and "Last Modified By" (cyn+49 whit, 10/29/2024, 6:53 AM).



Submit a Housing Element on Behalf of a Jurisdiction

3. You can view and download your submitted Housing Element file by clicking on the **Related** tab and then clicking the **Download** button on the file you want to download.



Upload Housing Element Upload Site Inventory

HE Housing Element
AGOURA HILLS - 10/15/2021 - 10/15/2029

Details **Related**

Uploaded Files

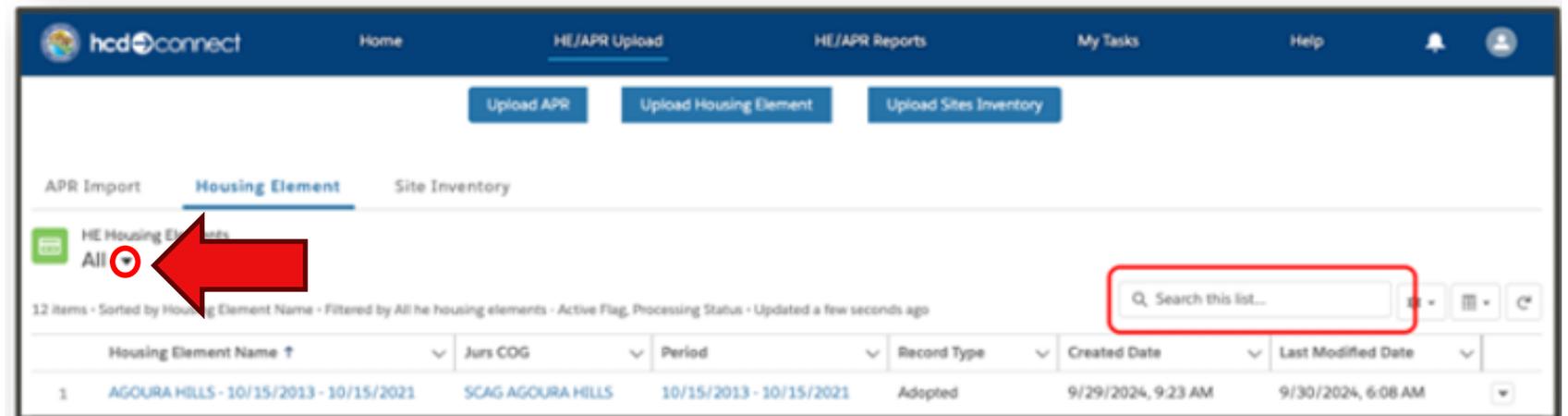
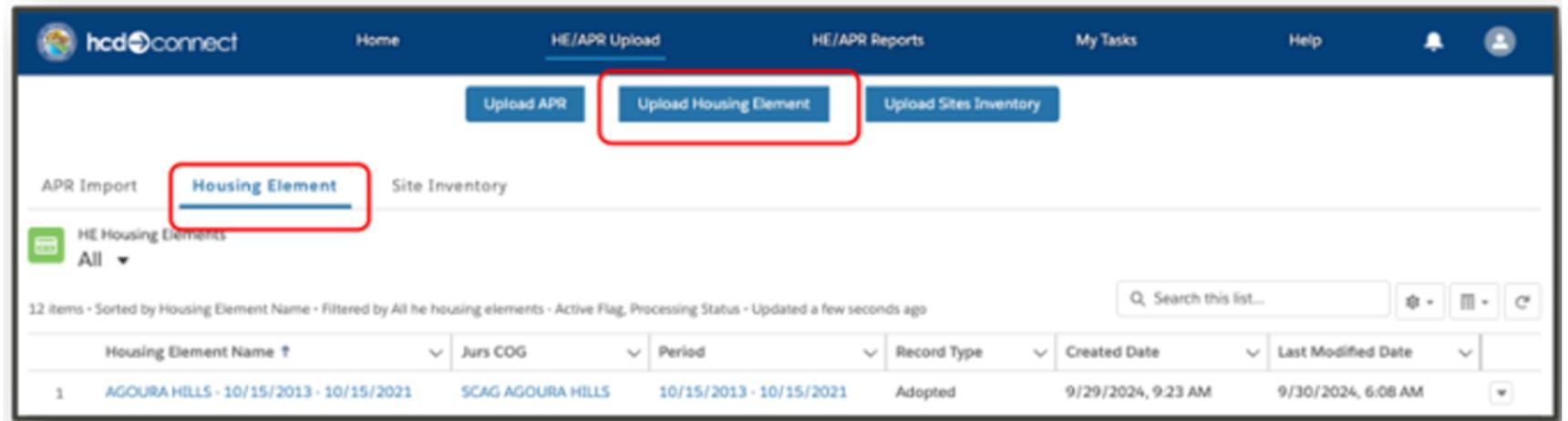
File Name	Type	Size (KB)	Last Modified	Download
Agoura Hills Housing Element 6th Draft copy-068cp000001fKLZAA2	PDF	16794.29	2024-10-29T13:53:50.000Z	Download



HE List View and Adding Supplemental Documentation

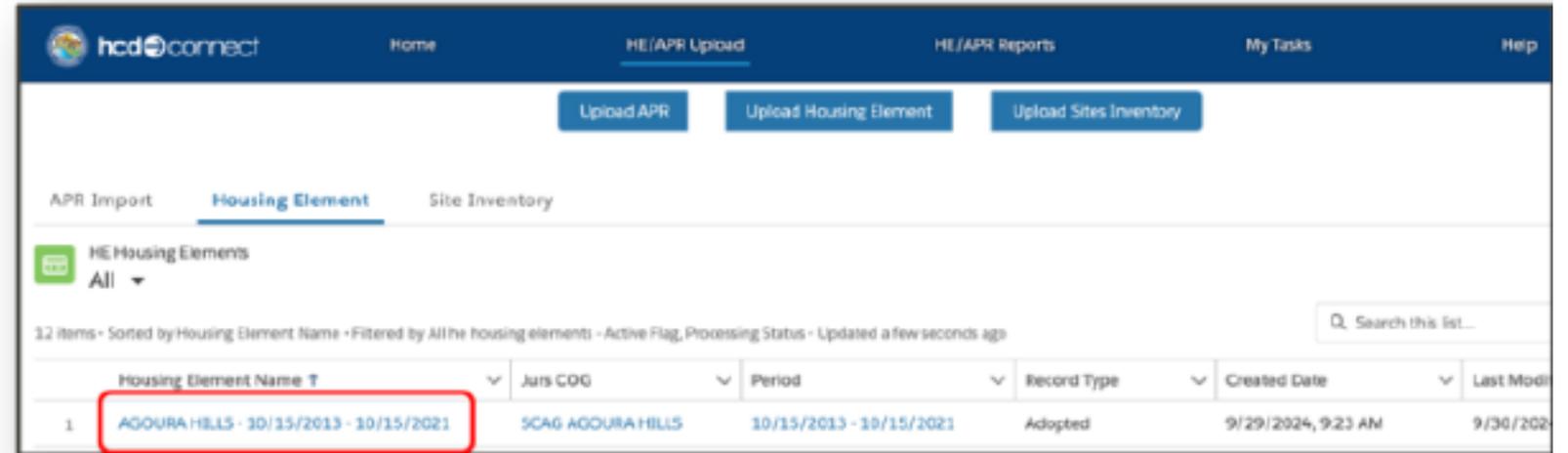
- On the Jurisdiction Account page, click on the **Upload Housing Element** button located on the top right.
- Use the **search bar** to search for a previous submission.

Note: You can select between the All or Recently Viewed list view to curate a suitable view of HE records



HE List View and Adding Supplemental Documentation

- Click on the hyperlink under **Housing Element Name** to open the record.



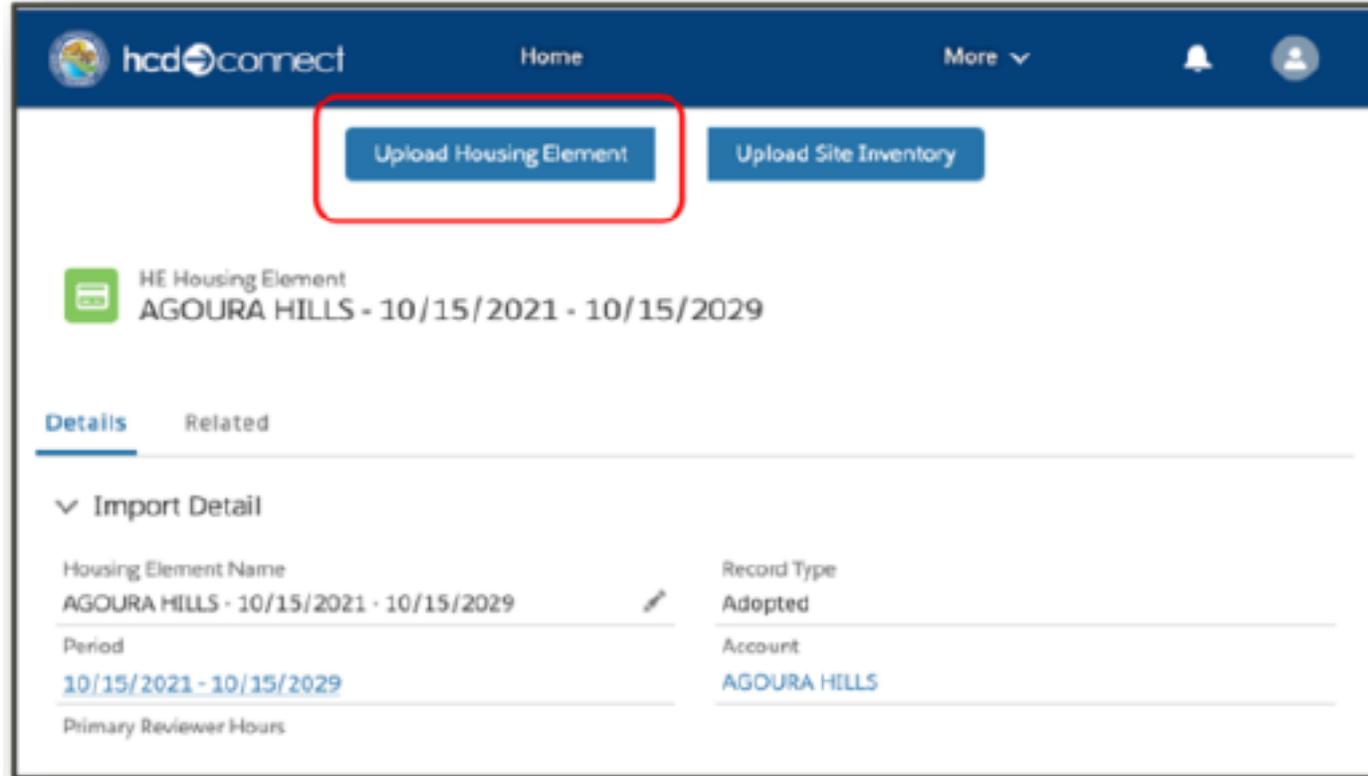
The screenshot shows the 'hcdconnect' web application interface. The top navigation bar includes 'Home', 'HE/APR Upload', 'HE/APR Reports', 'My Tasks', and 'Help'. Below the navigation bar are three buttons: 'Upload APR', 'Upload Housing Element', and 'Upload Sites Inventory'. The main content area has tabs for 'APR Import', 'Housing Element', and 'Site Inventory'. The 'Housing Element' tab is active, showing a list of 'HE Housing Elements'. The list is filtered to 'All' and contains 12 items. The first item is highlighted with a red box. The table columns are: Housing Element Name T, Juris COG, Period, Record Type, Created Date, and Last Modified.

	Housing Element Name T	Juris COG	Period	Record Type	Created Date	Last Modified
1	AGOURA HILLS - 10/15/2013 - 10/15/2021	SCAG AGOURA HILLS	10/15/2013 - 10/15/2021	Adopted	9/29/2024, 9:23 AM	9/30/2024



HE List View and Adding Supplemental Documentation

- From the Housing Element record page, click the **Upload Housing Element** button located at the top of the page.



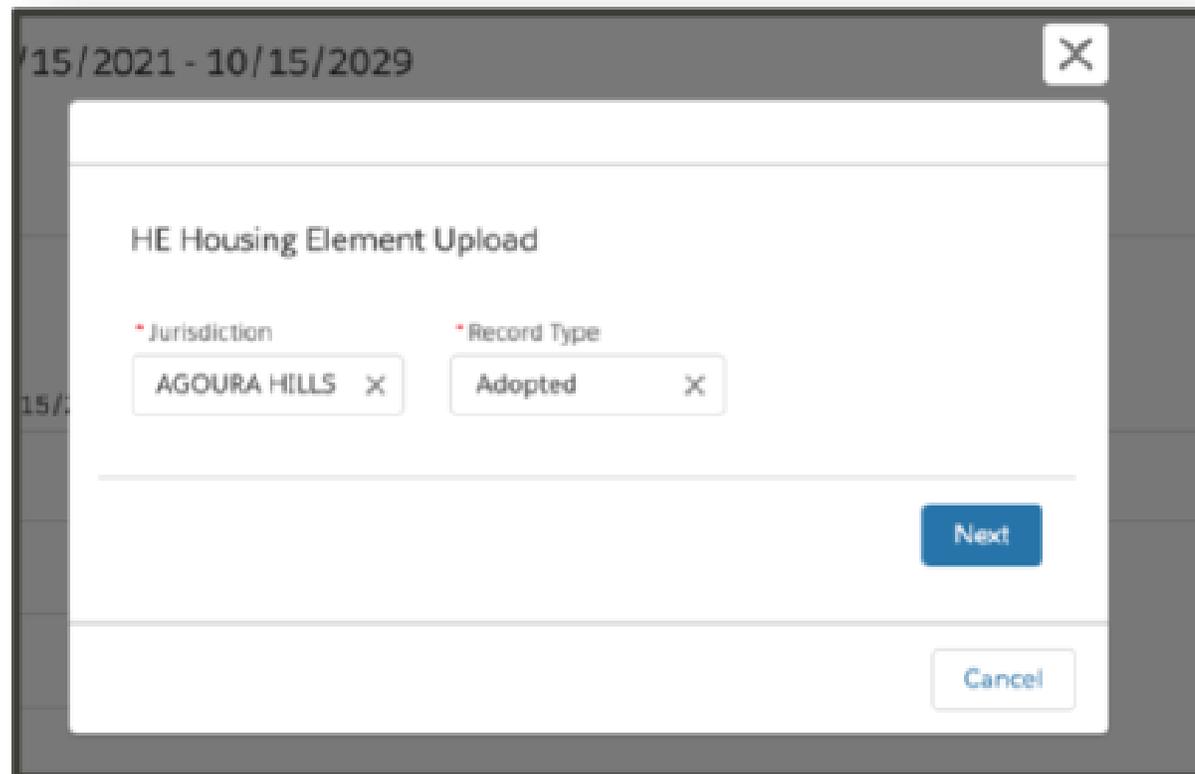
The screenshot displays the 'hcdconnect' web application interface. At the top, there is a navigation bar with the 'hcdconnect' logo, 'Home' text, a 'More' dropdown menu, and notification and user profile icons. Below the navigation bar, two blue buttons are visible: 'Upload Housing Element' (highlighted with a red rectangular box) and 'Upload Site Inventory'. The main content area shows a record for 'HE Housing Element AGOURA HILLS - 10/15/2021 - 10/15/2029'. Below this, there are tabs for 'Details' (selected) and 'Related'. Under the 'Details' tab, there is a section titled 'Import Detail' with a dropdown arrow. This section contains a table of metadata:

Housing Element Name	AGOURA HILLS - 10/15/2021 - 10/15/2029	Record Type	Adopted
Period	10/15/2021 - 10/15/2029	Account	AGOURA HILLS
Primary Reviewer Hours			



HE List View and Adding Supplemental Documentation

- The Record Type will be pre-populated since this additional information is being tied to your previously submitted HE record.
- Click **Next**.



15/2021 - 10/15/2029

HE Housing Element Upload

Jurisdiction: AGOURA HILLS X

Record Type: Adopted X

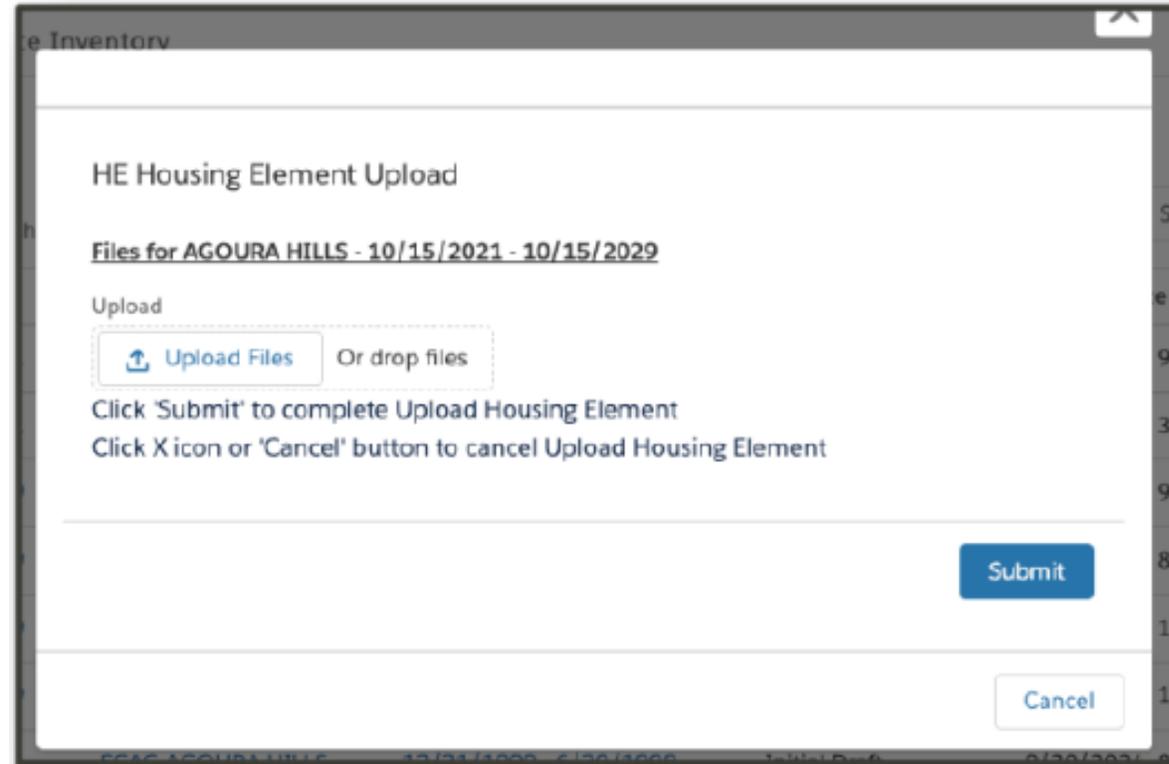
Next

Cancel



HE List View and Adding Supplemental Documentation

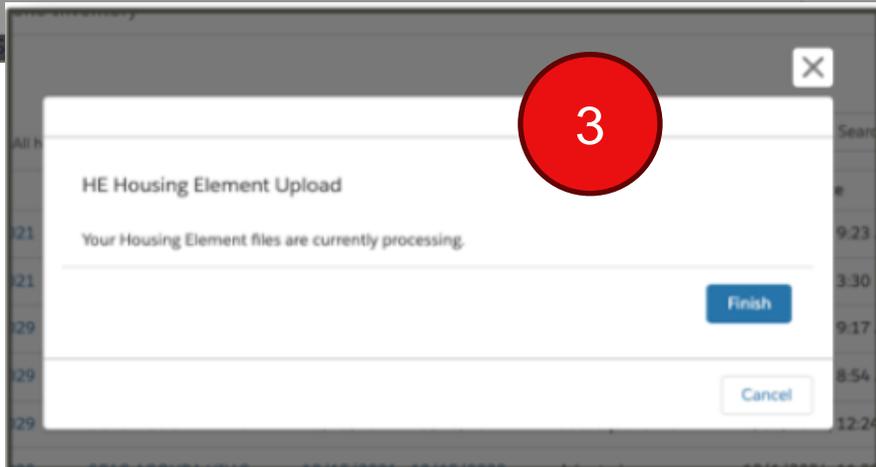
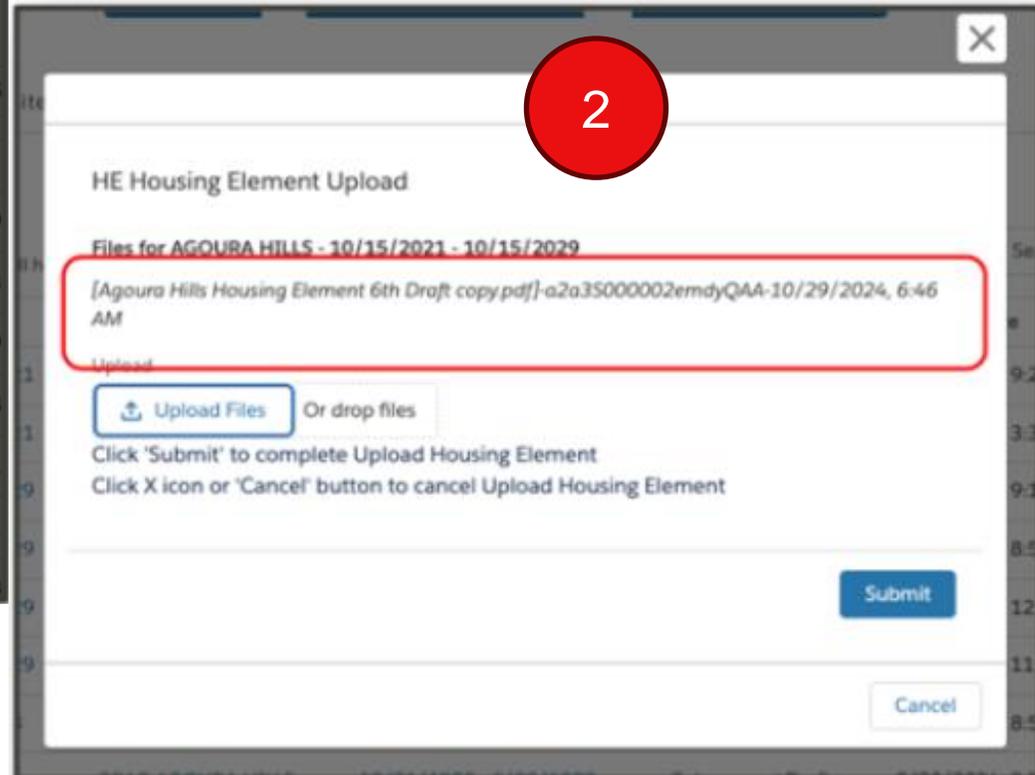
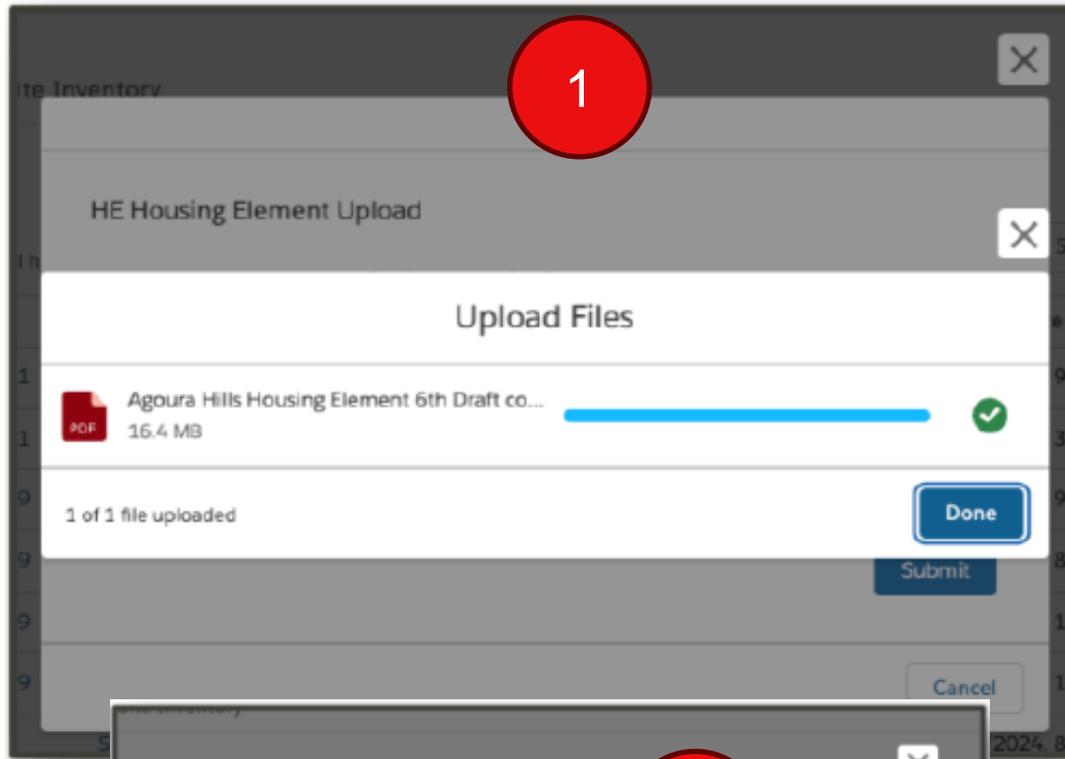
- Click on **Upload Files** or drag and drop
- Once file is uploaded, click Done then Submit.



The screenshot shows a web interface titled "e Inventory" with a sub-header "HE Housing Element Upload". Below this, it specifies "Files for AGOURA HILLS - 10/15/2021 - 10/15/2029". An "Upload" section contains a dashed box with an "Upload Files" button (with an upward arrow icon) and the text "Or drop files". Below the upload area, instructions state: "Click 'Submit' to complete Upload Housing Element" and "Click X icon or 'Cancel' button to cancel Upload Housing Element". At the bottom right, there are two buttons: a blue "Submit" button and a white "Cancel" button with a grey border.



HE List View and Adding Supplemental Documentation



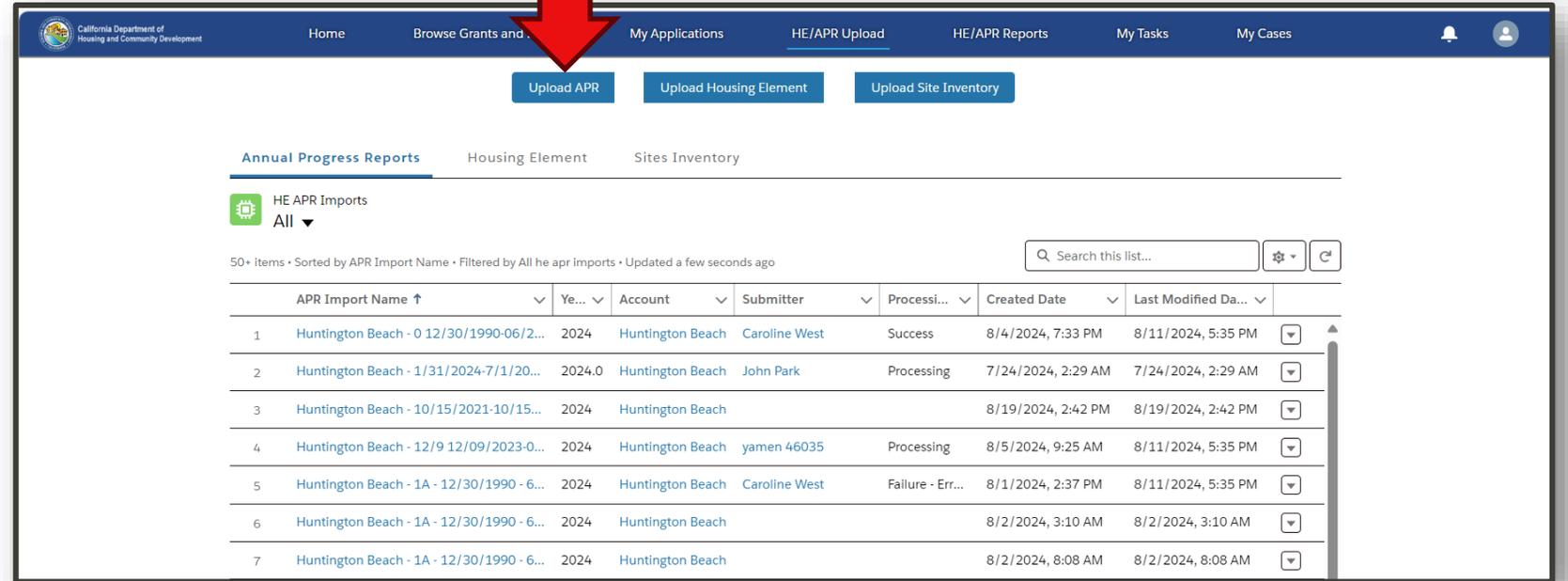
Annual Progress Reports Submission

HCD CONNECT USER PORTAL | Quick Reference Guide



Submitting APR

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



The screenshot shows the 'HE/APR Upload' tab in the California Department of Housing and Community Development portal. A red arrow points to the 'Upload APR' button. Below the navigation bar, there are three buttons: 'Upload APR', 'Upload Housing Element', and 'Upload Site Inventory'. The 'Annual Progress Reports' section is active, showing a table of 'HE APR Imports'.

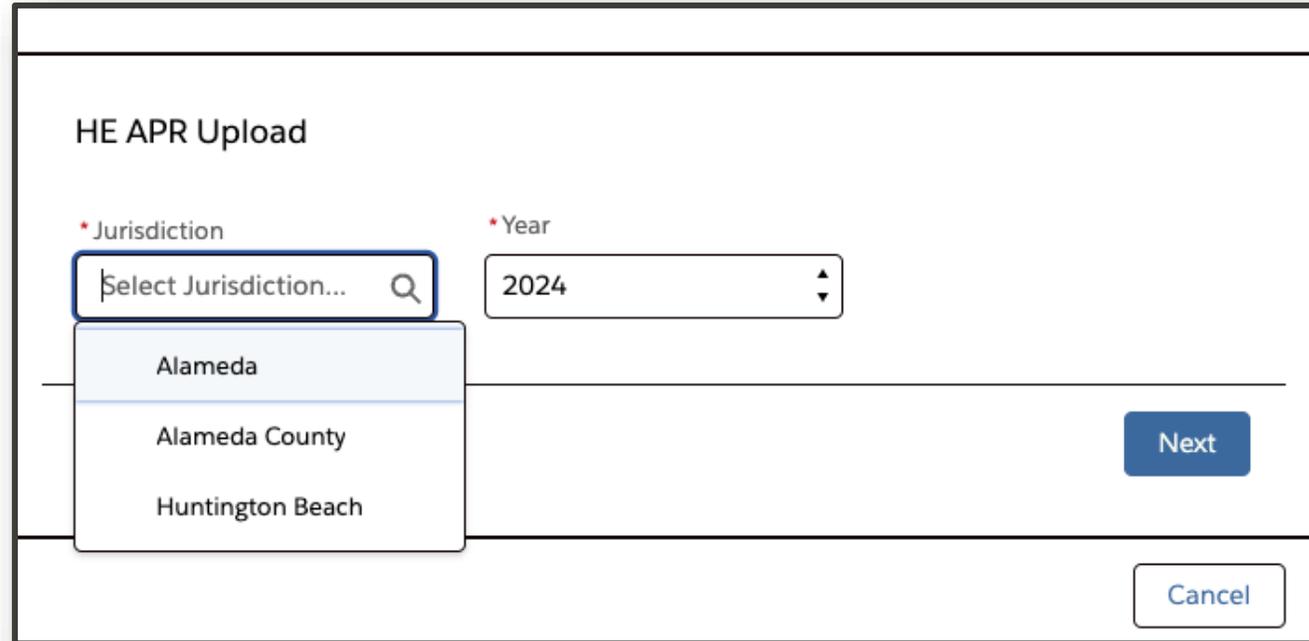
	APR Import Name ↑	Ye...	Account	Submitter	Processi...	Created Date	Last Modified Da...	
1	Huntington Beach - 0 12/30/1990-06/2...	2024	Huntington Beach	Caroline West	Success	8/4/2024, 7:33 PM	8/11/2024, 5:35 PM	▼
2	Huntington Beach - 1/31/2024-7/1/20...	2024.0	Huntington Beach	John Park	Processing	7/24/2024, 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 AM	▼
7	Huntington Beach - 1A - 12/30/1990 - 6...	2024	Huntington Beach			8/2/2024, 8:08 AM	8/2/2024, 8:08 AM	▼



Submitting APR

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

3. Click **Next**.



The screenshot shows a web form titled "HE APR Upload". It contains two main input fields: "Jurisdiction" and "Year". The "Jurisdiction" field is a search-style dropdown menu with a magnifying glass icon, currently displaying "Select Jurisdiction...". A dropdown menu is open below it, listing three options: "Alameda", "Alameda County", and "Huntington Beach". The "Year" field is a standard dropdown menu with the year "2024" selected. To the right of the "Year" field is a blue "Next" button. At the bottom right of the form is a "Cancel" button.



Submitting APR

4. Select the appropriate planning period(s).

5. Click **Next**.

HE APR Upload

Period 1

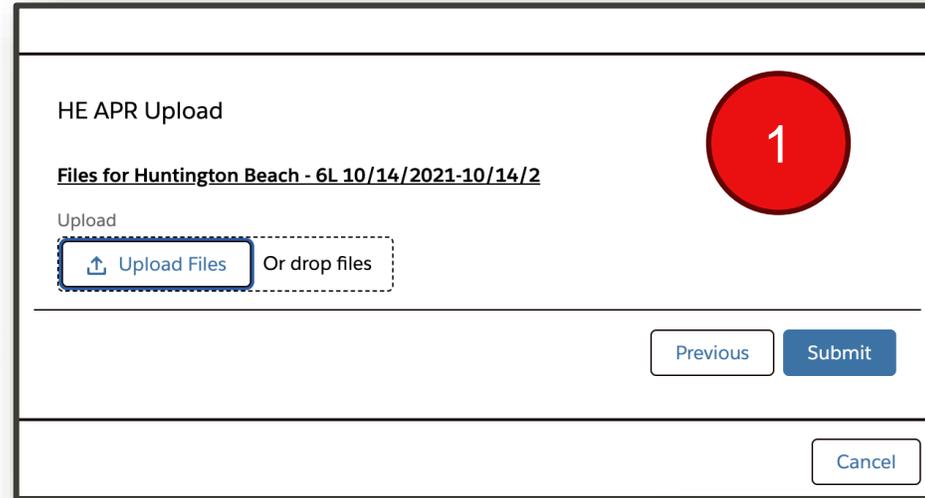
Previous Next

Cancel



Submitting APR

6. Click **Upload Files** or drag and drop.



HE APR Upload

Files for Huntington Beach - 6L 10/14/2021-10/14/2

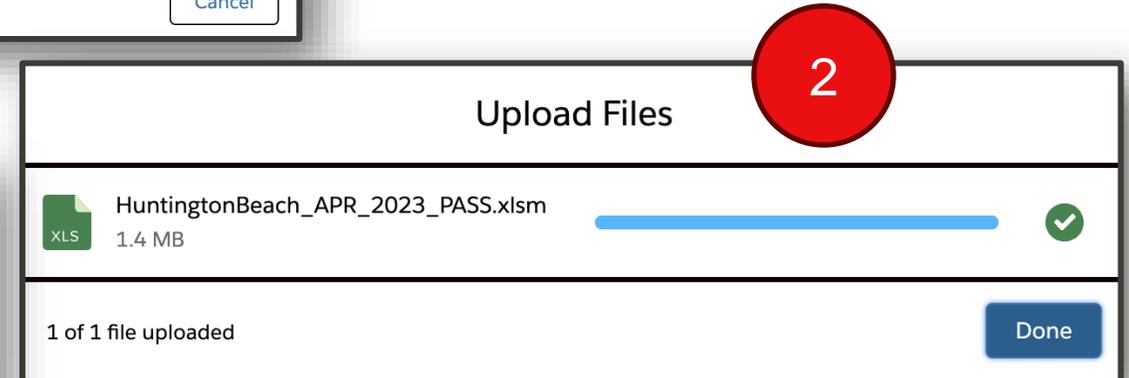
Upload

Or drop files

Previous Submit

Cancel

7. Once the green check appears, click **Done**.



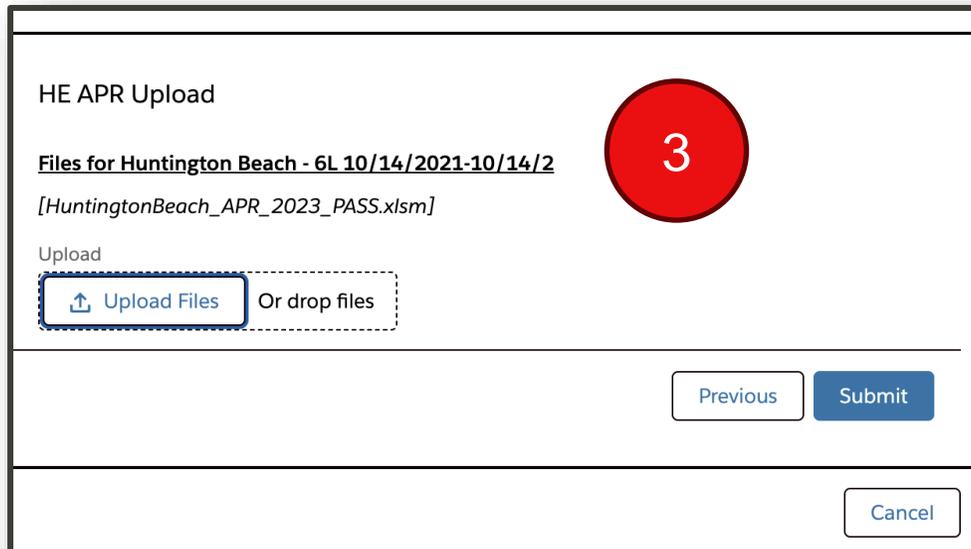
Upload Files

HuntingtonBeach_APR_2023_PASS.xlsm 1.4 MB

1 of 1 file uploaded

Done

8. Click **Submit**.



HE APR Upload

Files for Huntington Beach - 6L 10/14/2021-10/14/2

[HuntingtonBeach_APR_2023_PASS.xlsm]

Upload

Or drop files

Previous Submit

Cancel



Submitting APR

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

10. Click **Finish**.

HE APR Upload

Your APR files are currently processing.

[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 will receive a notification once the validation process is complete.

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	 John Park	Error File	
Processing Status	Processing		
APR Import			

Import Detail

File Name	[HuntingtonBeach_APR_2023_PASS.xlsm]	Year	2024
		Last Modified By	 John Park , 8/11/2024, 5:26 PM

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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 [https://hcd-
uat.sandbox.my.salesforce.com/sfc/servlet.shepherd/version/download/068cp000001C4DIAAK?operationContext=S1 \[hcd-
-uat.sandbox.my.salesforce.com\]](https://hcd-
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



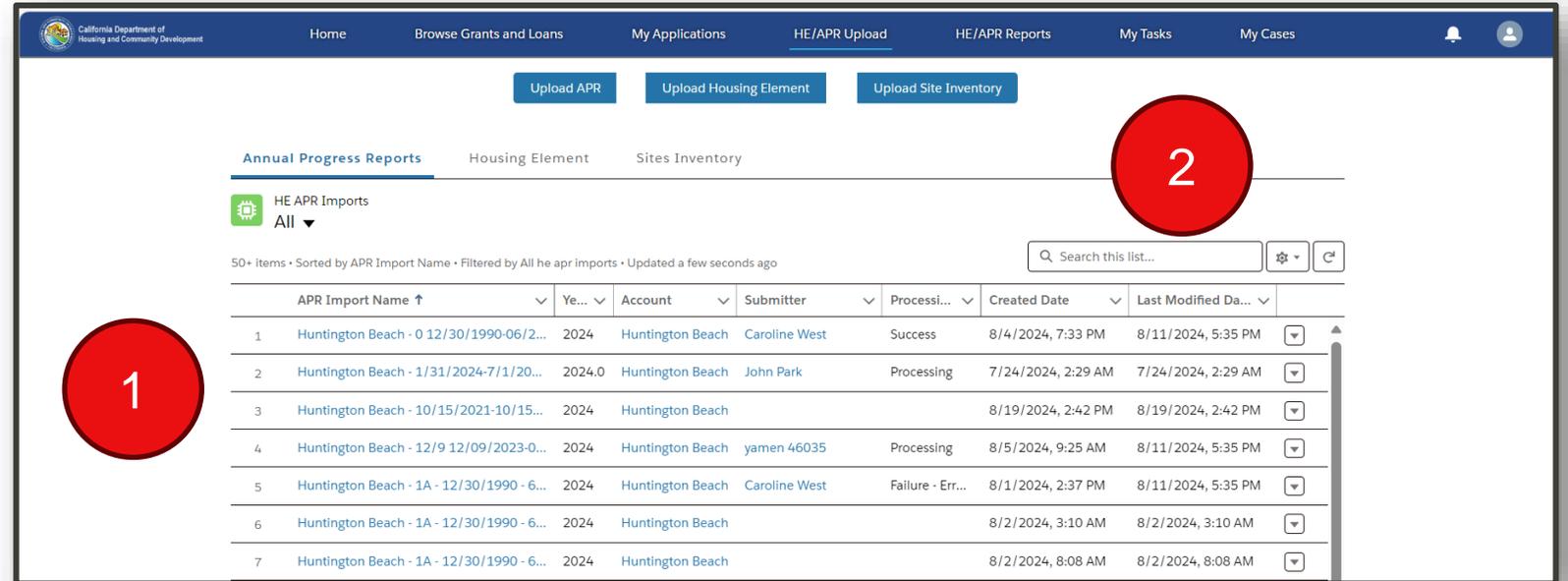
APR Error Email

Related	Details
Processing Details	
Processing Status	Submitter
APR Import	Submitted File
	Processing Response
	Error File
Review Details	
Primary Reviewer	Senior Reviewer
Primary Reviewer Comments:	Senior Review Comments
Primary Review Date	Senior Review Date
Import Detail	
Account	Year
Email	Import Status Desc
File Name	Owner
APR Import Name	
Created By	
Last Modified By	



HE/APR Upload Tab – Annual Progress Reports List View

1. 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.



The screenshot displays the 'HE/APR Upload' interface. At the top, there are navigation tabs: 'Home', 'Browse Grants and Loans', 'My Applications', 'HE/APR Upload', 'HE/APR Reports', 'My Tasks', and 'My Cases'. Below these are three buttons: 'Upload APR', 'Upload Housing Element', and 'Upload Site Inventory'. The main content area is titled 'Annual Progress Reports' and includes a sub-tab for 'Housing Element'. A red circle labeled '1' highlights the 'HE APR Imports' dropdown menu, which is currently set to 'All'. Below this is a search bar with the placeholder text 'Search this list...' and a red circle labeled '2' pointing to it. The search bar also includes a settings icon and a share icon. Below the search bar is a table with 7 rows of data. The table columns are: 'APR Import Name', 'Year', 'Account', 'Submitter', 'Process...', 'Created Date', and 'Last Modified Date'. The data rows are as follows:

	APR Import Name ↑	Ye...	Account	Submitter	Process...	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 AM
7	Huntington Beach - 1A - 12/30/1990 - 6...	2024	Huntington Beach			8/2/2024, 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!

- Programs that include more than one objective should include status for each objective.
- 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

	A	B	C	D
1	ANNUAL ELEMENT PROGRESS REPORT			
2	Housing Element Implementation			
3				
4	Jurisdiction			
5	Reporting Year	2024	(Jan. 1 - Dec. 31)	
7	Table D			
8	Program Implementation Status pursuant to GC Section 65583			
9	Housing Programs Progress Report Describe progress of all programs including local efforts to remove governmental constraints to the maintenance, improvement, and development of the housing element.			
10	1	2	3	4
11	Name of Program	Objective	Timeframe in H.E	Status of Program Implementation
12				
13				
14				
15				
16				
17				
18				
19				
20				
21				
22				
23				
24				
25				
26				
27				
28				
29				
30				
31				



Thank you!

HCD CONNECT USER PORTAL |

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

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

