

Organization & Tribal Registration and Consultant Management

California Department of
Housing and Community Development



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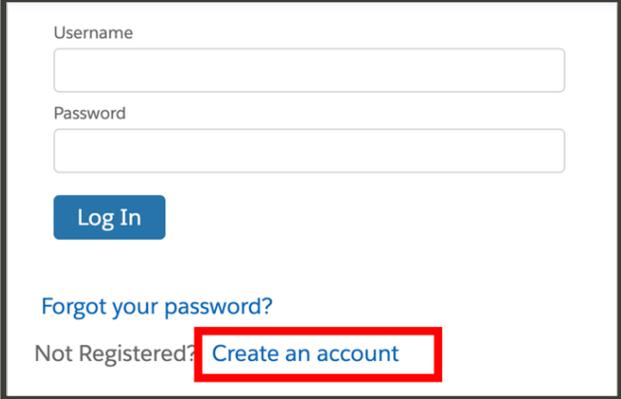
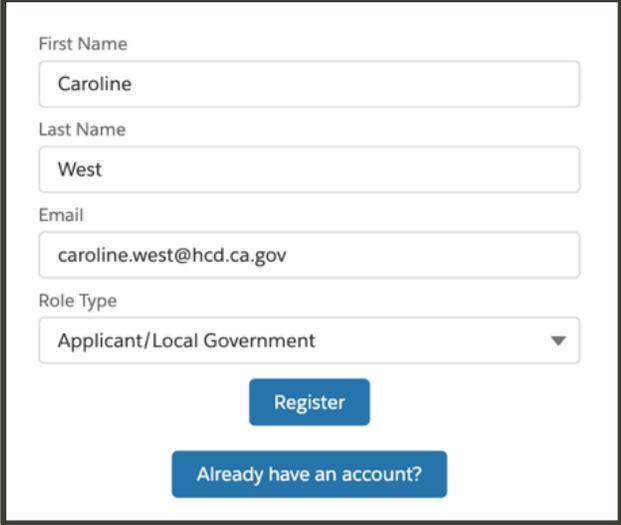
Learning Objectives

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

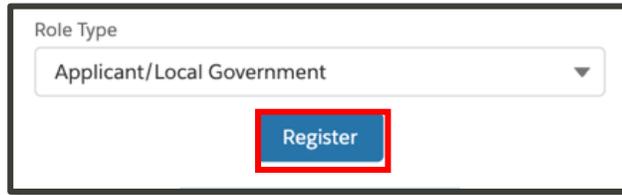
- Start your Registration
- Search and Setup your Entity
- Complete your User Profile
- Complete your Registration
- View your Entity Details in the Portal
- Approve or Reject a New User Request
- Manage your User Account
- Add a Consultant to your Jurisdiction

Portal Registration: New User Registration

You must register before you can use the HCD Connect User Portal. To register, please complete the following steps.

Steps	Screenshot Examples
1. Type the Portal URL in your preferred web browser: https://hcd.my.site.com/hcdconnect	
2. Click Create an Account	
3. Enter your First Name, Last Name, Email , and select the Role Type “Applicant/Local Government” .	

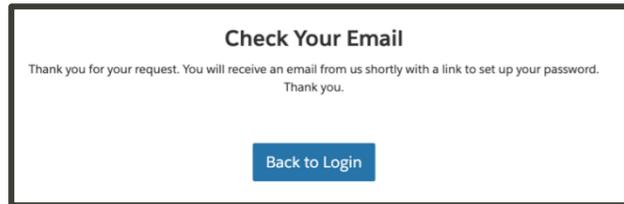
4. Then click **Register**



Role Type
Applicant/Local Government

Register

5. You will be taken to the Check Your Email screen. An email has been sent to the email address you entered.

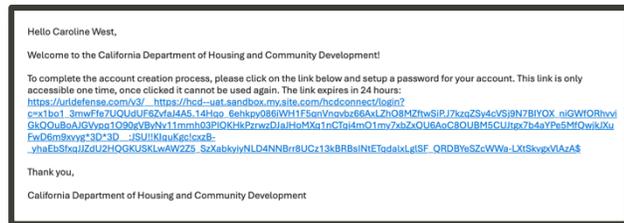


Check Your Email

Thank you for your request. You will receive an email from us shortly with a link to set up your password.
Thank you.

Back to Login

6. Click on the link in the email or copy the link into your web browser.



Hello Caroline West,

Welcome to the California Department of Housing and Community Development!

To complete the account creation process, please click on the link below and setup a password for your account. This link is only accessible one time, once clicked it cannot be used again. The link expires in 24 hours:
https://urldefense.com/v3/https://hcd-uat.sandbox.my.site.com/hcdconnect/login?ctx1bo1_3mwFfe7UOUdUFS2mf9H4A5_14Hqo_6eh3ky086iWH1F5onVnoyb66Axl2h08M2hw5iPj7zsuZ3y4c0Sj9N7B1YOX_mGWf0RhwjG5CQub8A32Vyoq1Q99a19yAyk11mm103PIQK4kPrwvDjaJh0M9n1ncTvw4mQ1my7ybZcUBAvc3CUBH5GCUjnp744yPw5M0w8XU_FyD6m9kyvz*SD*SD*_JSU!KlqKcIcozB-_yhaEb5xajJZdU2HOGKUSKLwAWZ25_SzXabkiyNLD4NNBrr8UCz13k8BBelNIETodakLgISF_ORDBYwSzCWWa-LXISkyevVIAzA8

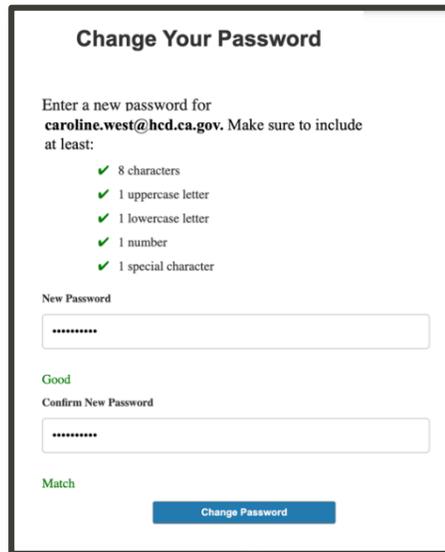
Thank you,
California Department of Housing and Community Development

7. You will be taken to the Change Your Password screen. Enter in a password and re-enter it to confirm.

The password criteria include the following:

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

The green checks will indicate that you are meeting the required password criteria.



Change Your Password

Enter a new password for **caroline.west@hcd.ca.gov**. Make sure to include at least:

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

New Password

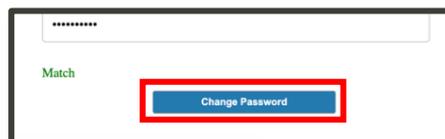
Good

Confirm New Password

Match

Change Password

8. Click the **Change Password** button to proceed.



Match

Change Password

Portal Registration: Entity Search and Setup

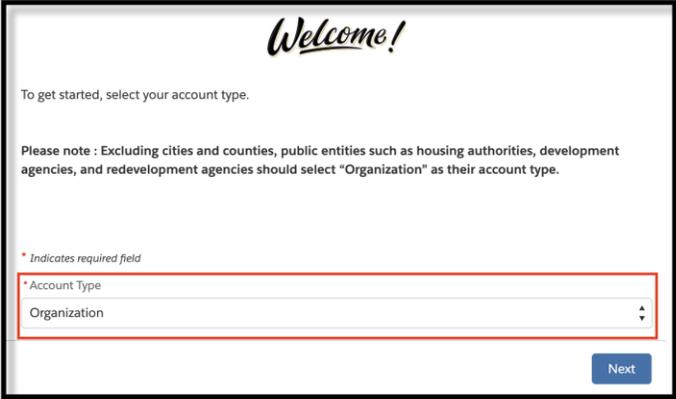
Steps	Screenshot Examples
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1. Once you have created a password, you will be taken to the Portal's welcome screen.

Please Note: Public entities such as housing authorities, development agencies, and redevelopment agencies should select **“Organization”** as the account type.

Tribes (both Federally recognized and non-Federally recognized) should select **“Tribal”** as the account type.

Click **Next** to continue.

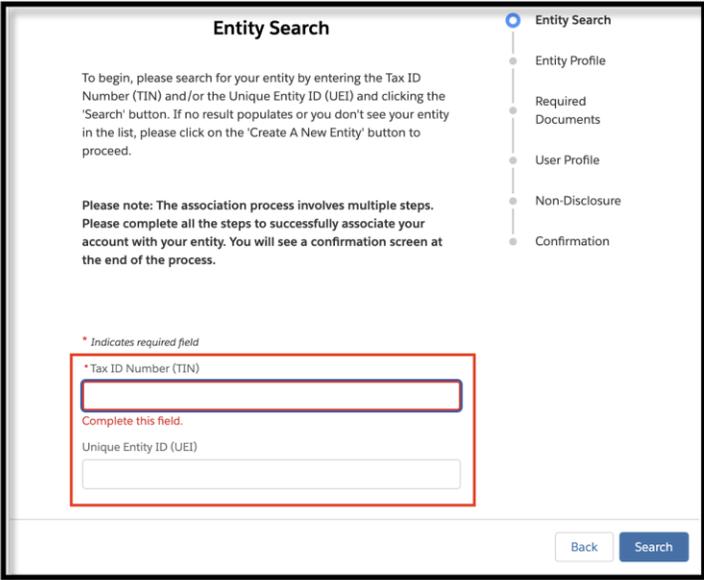


2. You will then reach the Entity Search screen. Please enter either the organization's tax ID number (TIN) or the unique entity ID (UEI).

Please Note: TIN value is a required field and should be entered without “-”.

UEI is an optional field.

Click **Search**.



3. The search result will display a list of entities that match on the TIN provided. If your entity is displayed in the result, you may confirm your select by choosing “Confirm Selected” and click **Next** to continue.

If the search does not locate your entity, you can create a new entity by selecting “Creating A New Entity” and click **Next** to continue.

The screenshot shows the 'Entity Search' page. At the top, there is a title 'Entity Search' and a progress indicator on the right with steps: Entity Search (selected), Entity Profile, Required Documents, User Profile, Non-Disclosure, and Confirmation. Below the title, there is a paragraph: 'To begin, please search for your entity by entering the Tax ID Number (TIN) and/or the Unique Entity ID (UEI) and clicking the 'Search' button. If no result populates or you don't see your entity in the list, please click on the 'Create A New Entity' button to proceed.' A 'Please note' section follows: '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.' Below this is a 'Search Results' section with the text '1 of 1 item - 0 items selected'. There are four columns: 'Tax ID Num...', 'Entity Name', 'Entity Type', and 'Mailing Add...'. A single row is visible with a red box around the 'Entity Name' field. Below the search results, there is a legend: '* Indicates required field' and '* Confirm Selection Or Create New Entity' with two radio buttons: 'Confirm Selection' and 'Create A New Entity'. At the bottom right, there are 'Back' and 'Next' buttons.

4. If the search generated no matching result, you can create a new entity by clicking on the “**Create A New Entity Button**”.

The screenshot shows the 'Entity Search' page. At the top, there is a title 'Entity Search' and a progress indicator on the right with steps: Entity Search (selected), Entity Profile, Required Documents, User Profile, Non-Disclosure, and Confirmation. Below the title, there is a paragraph: 'To begin, please search for your entity by entering the Tax ID Number (TIN) and/or the Unique Entity ID (UEI) and clicking the 'Search' button. If no result populates or you don't see your entity in the list, please click on the 'Create A New Entity' button to proceed.' A 'Please note' section follows: '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.' Below this are two input fields: 'Tax ID Number' and 'UEI Number', both with redacted values. Below the input fields is a 'Search Results' section with the text: 'We were unable to find your entity in our records. Please click the 'Create A New Entity' button to begin the entity registration process.' At the bottom right, there are 'Back' and 'Create A New Entity' buttons, with the 'Create A New Entity' button highlighted with a red box.

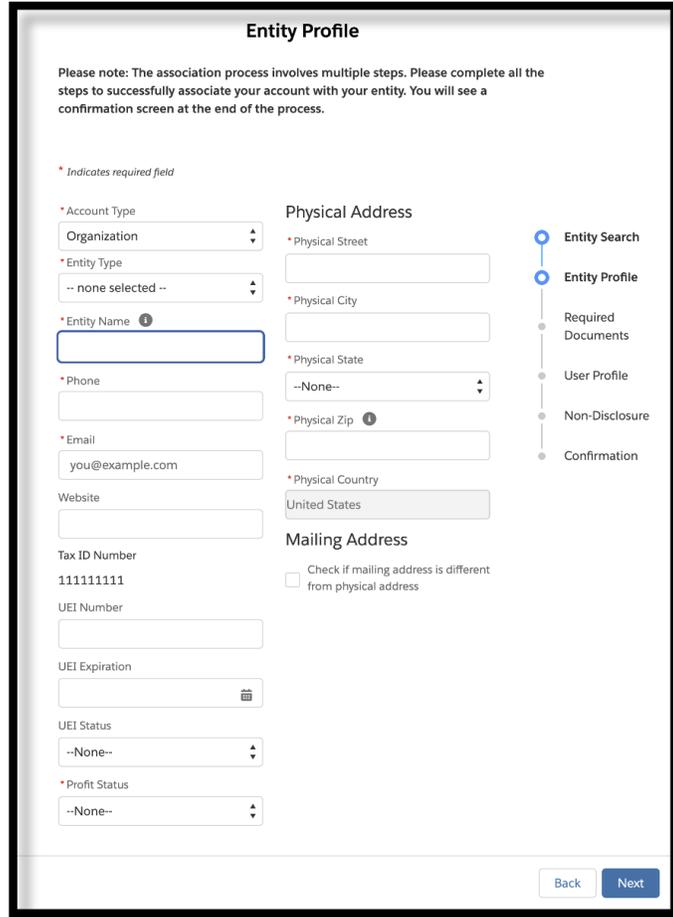
5. To create a new entity, please complete the entity profile screen and upload the requested document.

Please Note:

Public entities such as housing authorities, development agencies, and redevelopment agencies should select **“Organization”** as the account type.

Tribes (both Federally recognized and non-Federally recognized) should select **“Tribal”** as the account type.

Click **Next** to complete the entity profile and move forward to setup the user profile.



Entity 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

* Account Type: Organization

* Entity Type: -- none selected --

* Entity Name: [text input]

* Phone: [text input]

* Email: you@example.com

Website: [text input]

Tax ID Number: 111111111

UEI Number: [text input]

UEI Expiration: [calendar icon]

UEI Status: --None--

* Profit Status: --None--

Physical Address

* Physical Street: [text input]

* Physical City: [text input]

* Physical State: --None--

* Physical Zip: [text input]

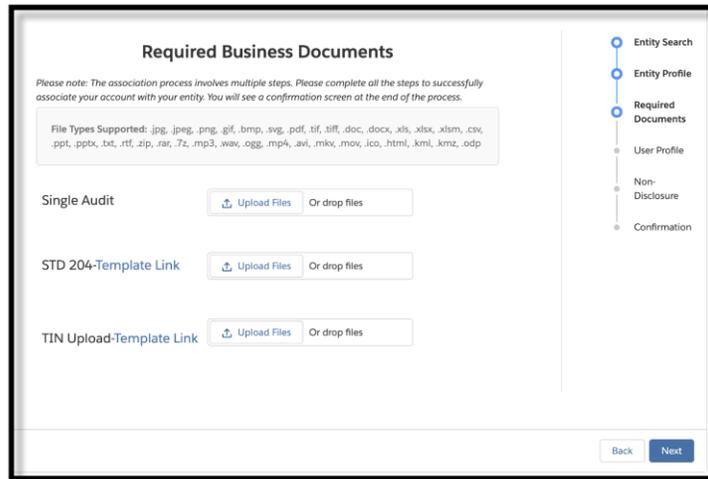
* Physical Country: United States

Mailing Address

Check if mailing address is different from physical address

Navigation: Entity Search, Entity Profile, Required Documents, User Profile, Non-Disclosure, Confirmation

Buttons: Back, Next



Required Business Documents

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.

File Types Supported: .jpg, .jpeg, .png, .gif, .bmp, .svg, .pdf, .tif, .tiff, .doc, .docx, .xls, .xlsx, .xism, .csv, .ppt, .ppbx, .txt, .rtf, .zip, .rar, .7z, .mp3, .wav, .ogg, .mp4, .avi, .mkv, .mov, .ico, .html, .kml, .kmlz, .odp

Single Audit: Upload Files Or drop files

STD 204-Template Link: Upload Files Or drop files

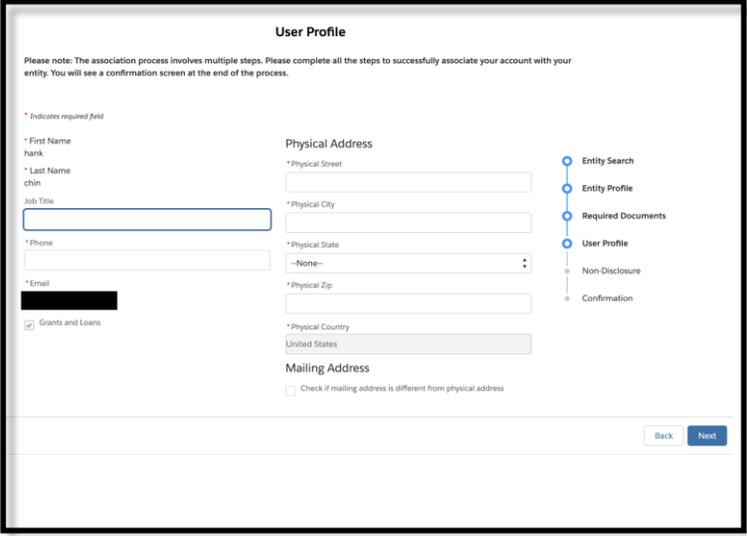
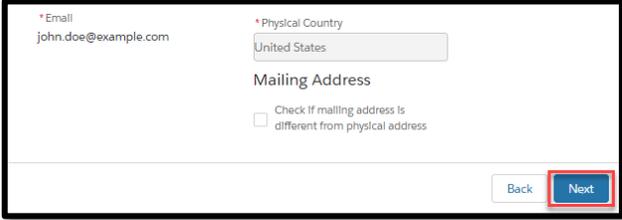
TIN Upload-Template Link: Upload Files Or drop files

Navigation: Entity Search, Entity Profile, Required Documents, User Profile, Non-Disclosure, Confirmation

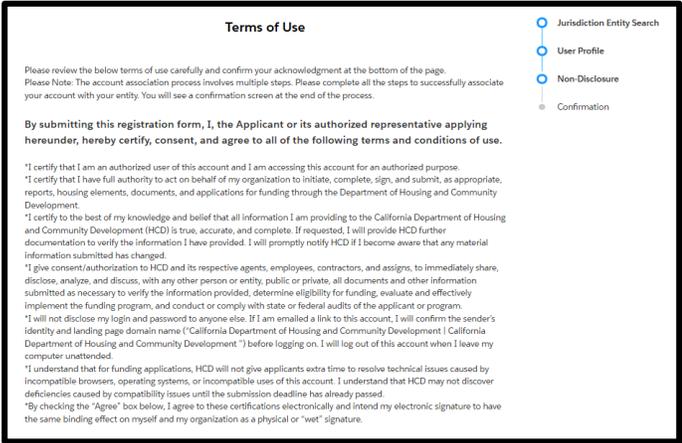
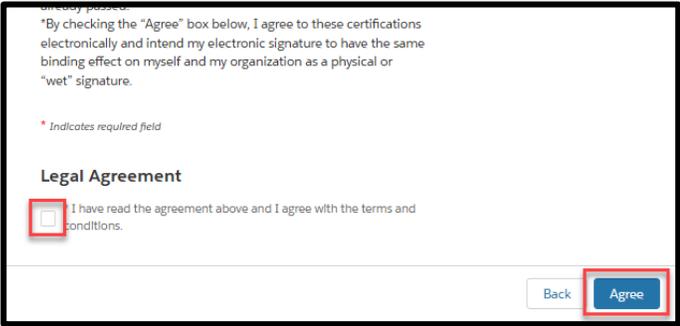
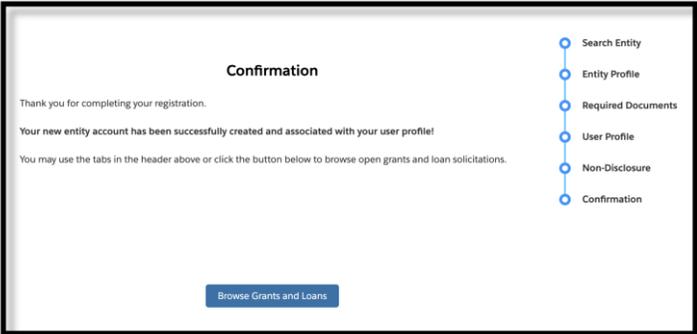
Buttons: Back, Next

Portal Registration: User Profile

Enter in your information into the User Profile page.

Steps	Screenshot Examples
<p>1. Enter in the following information:</p> <ul style="list-style-type: none">• Job Title• Phone• Physical Address – enter in your business address.• Mailing Address – Select if mailing address is different than your physical address.	 <p>The screenshot shows the 'User Profile' registration page. It includes a progress indicator on the right with steps: Entity Search, Entity Profile, Required Documents, User Profile (highlighted), Non-Disclosure, and Confirmation. The form fields include: First Name (blank), Last Name (chin), Job Title (blank), Phone (blank), Email (redacted), Grants and Loans (checked), Physical Address (Street, City, State, Zip, Country), and Mailing Address (checkbox for 'different from physical address'). 'Back' and 'Next' buttons are at the bottom right.</p>
<p>2. Click Next to continue.</p>	 <p>This close-up shows the 'Mailing Address' section. The 'Email' field contains 'john.doe@example.com' and the 'Physical Country' dropdown is set to 'United States'. The checkbox for 'Check if mailing address is different from physical address' is unchecked. The 'Next' button is highlighted with a red box.</p>

Portal Notification: Complete Your Registration

Steps	Screenshot Examples
<p>1. To complete your registration, you must read and accept the non-disclosure agreement.</p>	
<p>2. Click the checkbox under Legal Agreement. Then, click the Agree button.</p>	
<p>3. You will then reach a confirmation screen confirming your successful user and entity registration.</p> <p>Please Note: Your user registration will be forwarded to the entity's account administrator for approval if the user is associated with an organization or tribal entity that is already present in the system,</p>	

Confirmation

Your entity association request has been successfully sent to the account administrator for review and approval.

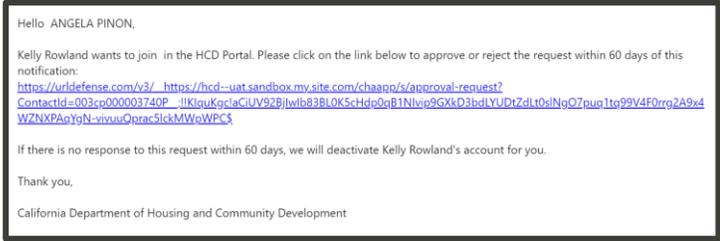
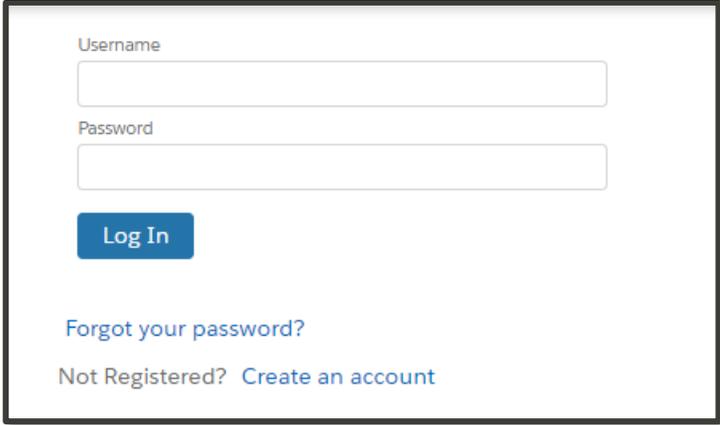
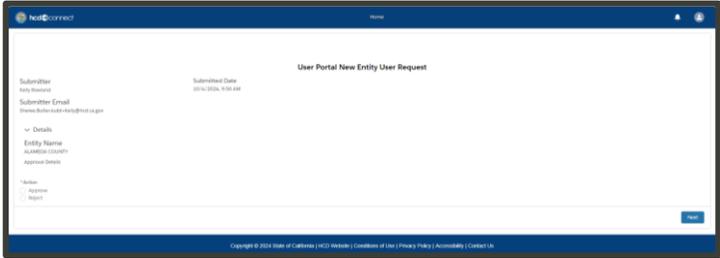
If you do not receive an email confirmation, contact the account administrator/manager to confirm that all the information entered and submitted is accurate or to determine if further actions are required.

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

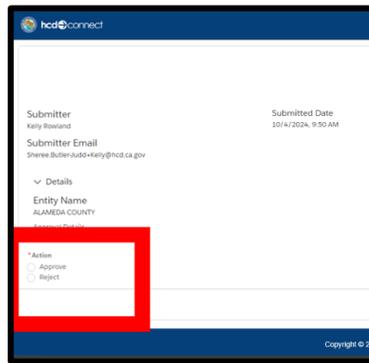
[Return to Login](#)

Portal Registration: Approve/Reject New Entity Join Request

The Account Administrator for your entity will receive an email indicating that a user is requesting to join the HCD Connect User Portal for your organization/tribal entity. If you are the Account Administrator and receive this notification, follow these steps to approve or reject the requesting user.

Steps	Screenshot Examples
<p>1. Click on the email received from HCD Connect.</p>	
<p>2. You will need to be logged into the HCD Connect User Portal. You will be directed to the login screen.</p> <p>Enter in your username and password to enter the portal and click 'Log In.'</p>	
<p>3. The User Portal New Entity User Request screen will open.</p>	

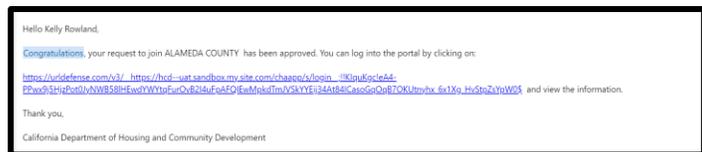
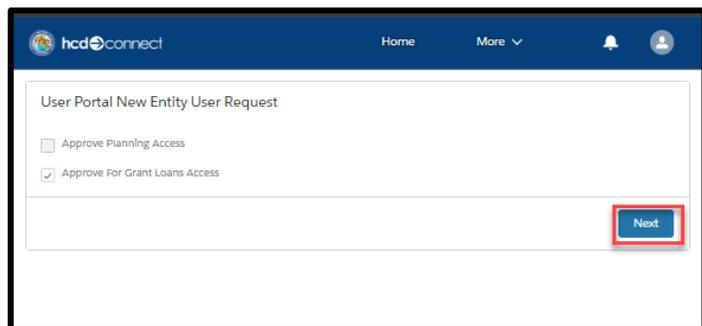
4. Under Action, you can select **Approve** or **Reject**.



5. Click **Next** to complete the action.



6. If you select **Approve** and click **Next**, you will then reach a User Portal New Entity User Request screen. Click **Next** to complete the action. Requesting user will receive an email notification that their access has been granted.



7. If you select **Reject**, then the user will not get access to the Portal.

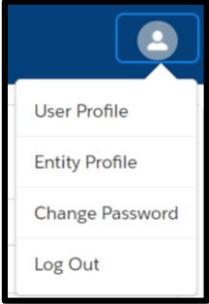
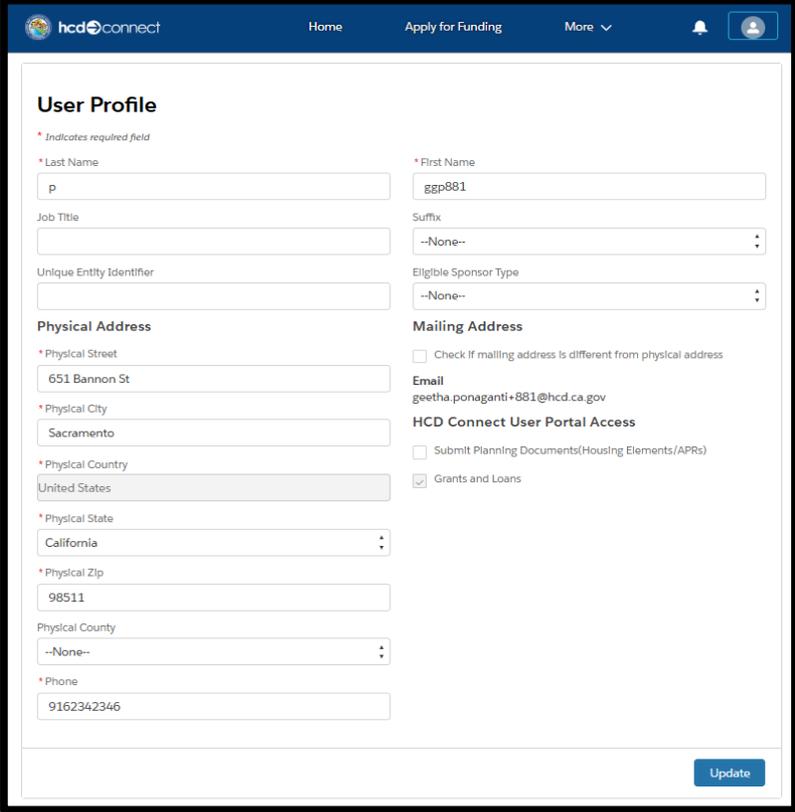
User Portal New Entity User Request	
REJECTED	
Submitter Kelly Rowland	Submitted Date 10/12/2024, 9:50 AM
Details	
Approval Details	
Submitter Email sheree.butler-judd+test@hcd.ca.gov	Entity Name ALAMEDA COUNTY
View	

Hello Kelly Rowland,

Your request to access ALAMEDA COUNTY in HCD Connect was not approved. If you feel you have received this message in error, please contact Sheree HCD Test, sheree.butler-judd+test@hcd.ca.gov for assistance.

Thank you,
California Department of Housing and Community Development

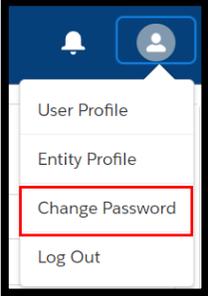
Manage Your User Account

Steps	Screenshot Examples
<p>1. To manage your user account details, click on the profile icon on the top right of the navigation bar.</p>	 <p>The screenshot shows the HCD Connect dashboard. At the top, there is a navigation bar with the HCD Connect logo and several menu items: Home, HE/APR Upload, HE/APR Reports, My Task, and Help. On the far right of the navigation bar, there is a profile icon, which is highlighted with a red rectangular box. Below the navigation bar, the main content area features a large blue banner with the text "Welcome to HCD Connect!" and several circular profile pictures of users.</p>
<p>2. Click on User Profile.</p>	 <p>The screenshot shows a dropdown menu that appears when the profile icon is clicked. The menu is white with a blue header containing a profile icon. It lists four options: "User Profile", "Entity Profile", "Change Password", and "Log Out". The "User Profile" option is highlighted with a blue background.</p>
<p>3. You can view your user information on the User Profile page. If you need to update any information, enter any updates in the fields on the page then click the Update button at the bottom right of the screen.</p>	 <p>The screenshot shows the "User Profile" page. The page has a blue header with the HCD Connect logo and navigation items: Home, Apply for Funding, and More. The main content area is titled "User Profile" and contains several input fields and sections. The fields are organized into two columns. The left column includes fields for Last Name (with 'P' entered), Job Title, Unique Entity Identifier, Physical Address (with 651 Bannon St, Sacramento, United States, California, and 98511 entered), Physical County (with --None-- selected), and Phone (with 9162342346 entered). The right column includes fields for First Name (with ggp881 entered), Suffix (with --None-- selected), and Eligible Sponsor Type (with --None-- selected). Below these fields, there is a "Mailing Address" section with a checkbox for "Check if mailing address is different from physical address" (unchecked), an "Email" field (with geetha.ponaganti+881@hcd.ca.gov entered), and an "HCD Connect User Portal Access" section with a checkbox for "Submit Planning Documents (Housing Elements/APRs)" (unchecked) and a checked checkbox for "Grants and Loans". At the bottom right of the page, there is a blue "Update" button.</p>

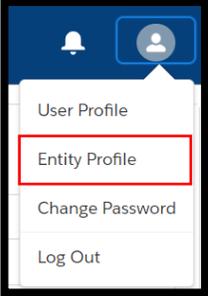
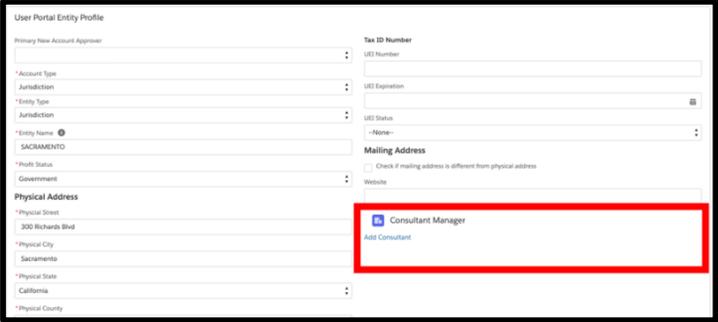
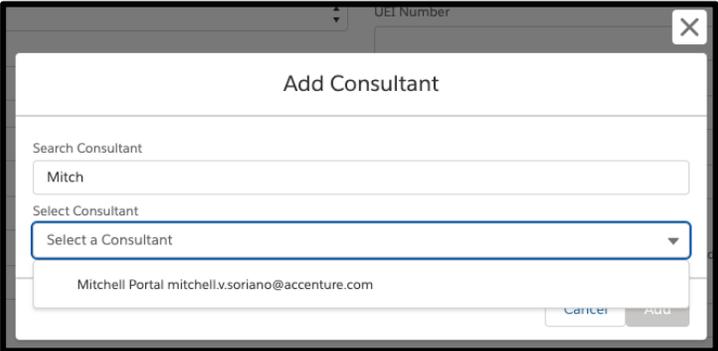
4. You will see that your changes have been saved.



Change Your Password

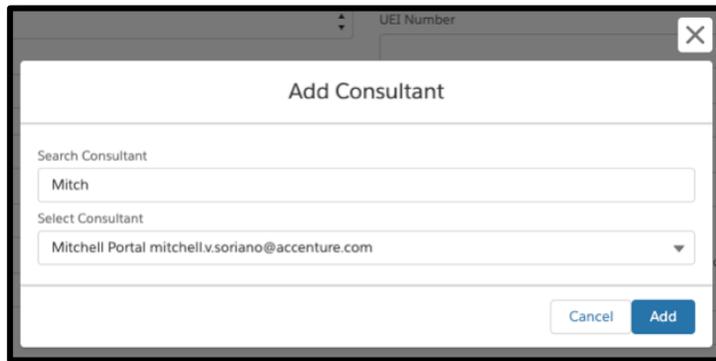
Steps	Screenshot Examples
<p>1. Click on Change Password to process a password change request.</p>	 <p>A screenshot of a user profile menu. The menu is open, showing options: User Profile, Entity Profile, Change Password, and Log Out. The 'Change Password' option is highlighted with a red rectangular box.</p>
<p>2. On the Change Your Password screen, enter in your old password and your new desired password.</p>	 <p>A screenshot of the 'Change Your Password' form. The form has three input fields: 'Old Password', 'New Password', and 'Verify New Password'. A red rectangular box highlights these three input fields. Below the input fields is a 'Change Password' button. Below the button, there is a list of password requirements:</p> <ul style="list-style-type: none">• At least 1 Uppercase letter (A-Z)• At least 1 Lowercase letter (a-z)• At least 1 Special Character - ! * \$ % ^ @• At least 1 Digit 0-9• Must be longer than 8 characters
<p>3. Then click the Change Password button.</p>	 <p>A screenshot of the 'Change Your Password' form. The form has three input fields: 'Old Password', 'New Password', and 'Verify New Password'. A red rectangular box highlights the 'Change Password' button at the bottom of the form.</p>

Add or Remove a Consultant to Your Account (For Account Administrator Only)

Steps	Screenshot Examples
<p>1. Click on the profile icon on the top right of the navigation bar.</p>	
<p>2. Click on Entity Profile.</p>	
<p>3. Locate the Consultant Manager and click Add Consultant.</p>	
<p>4. Type in the consultant's name in the Search Consultant bar and click on the Select Consultant field to see the results.</p> <p>You will be able to search by name and/or email.</p>	

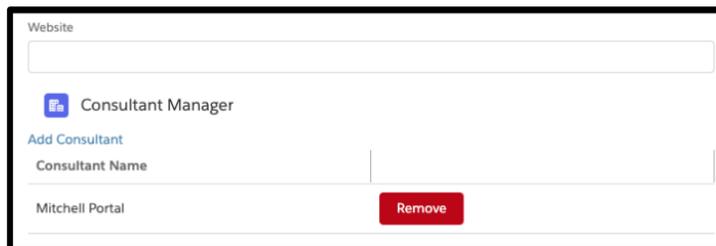
5. Select the consultant from the list and click **Add**.

Note: if you do not see the consultant in the list, they have not yet registered. Please instruct them to register to the portal.



6. Once added, the consultant will appear in the Consultant Manager. The user will receive an email once they have been added.

The consultant now has access to your account and can submit planning documents on behalf of your jurisdiction and can view previous submissions.



7. To remove a consultant's access to your entity's account, click the **Remove** button.

