

# Annual Progress Reports Submission

California Department of  
Housing and Community Development



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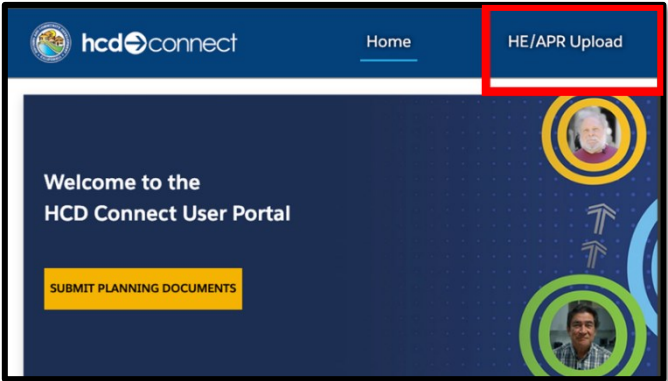
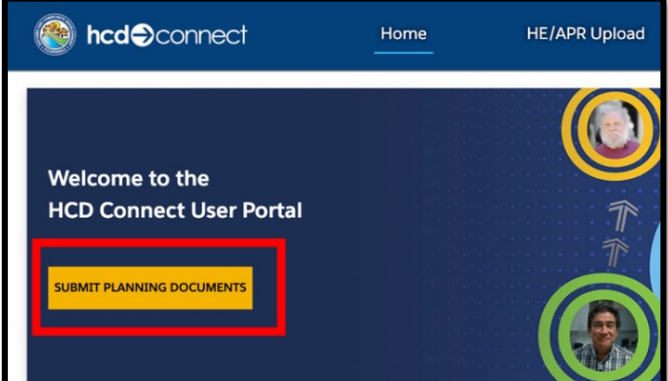
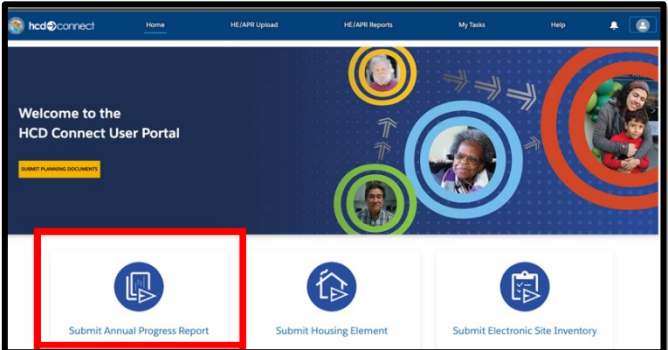
# Learning Objectives

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

- Navigate the HCD Connect User Portal
- Understand how to upload Annual Progress Reports to the Portal
- View previous submissions
- Resolve APR error files if errors are identified
- Re-submit APR files when needed
- Know what to do if you need to submit a revised APR file after submission
- Review the Power BI reports to track data submitted on APR

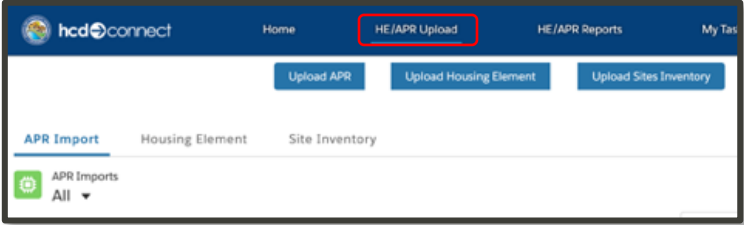
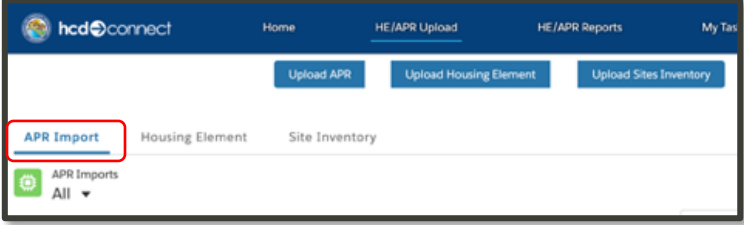
# HCD Connect Home Page

After you have created a user account and have successfully logged into the HCD Connect User Portal, you will see the home page. To submit your annual progress report, you will need to access the **HE/APR Upload** tab. There are several ways to navigate to this tab, as described below.

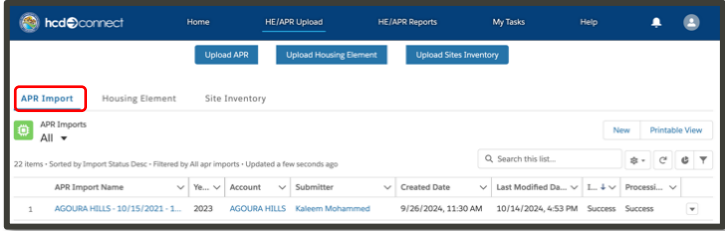
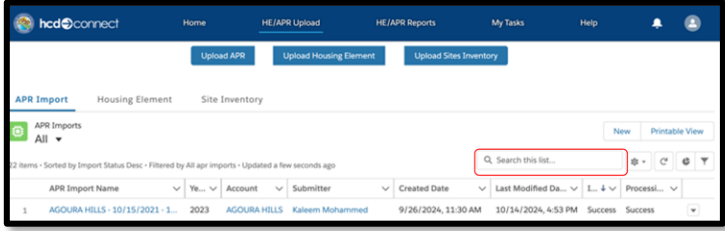
Ways to Access HE/APR Upload	Screenshot Examples
<p>1. Click on the <b>HE/APR Upload</b> tab from the navigation bar at the top of the page.</p>	 <p>The screenshot shows the top navigation bar of the HCD Connect User Portal. The 'HE/APR Upload' tab is highlighted with a red box. The main content area displays a welcome message and a 'SUBMIT PLANNING DOCUMENTS' button.</p>
<p>2. Click on the <b>Submit Planning Documents</b> button.</p>	 <p>The screenshot shows the 'SUBMIT PLANNING DOCUMENTS' button highlighted with a red box. The navigation bar shows 'Home' and 'HE/APR Upload' tabs.</p>
<p>3. Click on the <b>Submit Annual Progress Report</b> tile from the home page tile menu.</p>	 <p>The screenshot shows the bottom tile menu of the HCD Connect User Portal. The 'Submit Annual Progress Report' tile is highlighted with a red box. The navigation bar shows 'Home', 'HE/APR Upload', 'HE/APR Reports', 'My Tasks', and 'Help' tabs.</p>

# HE/APR Upload Tab

**HE/APR Upload** tab is the main page where you will be able to upload documents and manage all submissions of APRs, Housing Elements, and electronic Sites Inventory files. When you click on the tabs (APR Import, Housing Element, Site Inventory), you will be able to view your previous submissions.

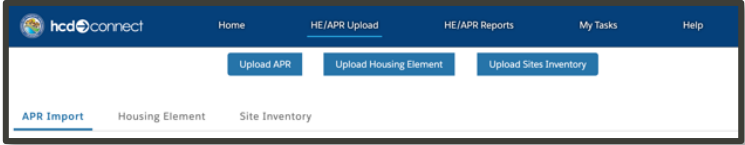
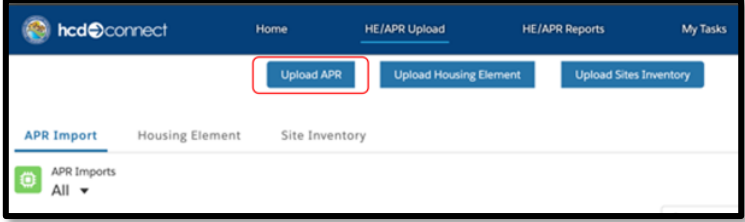
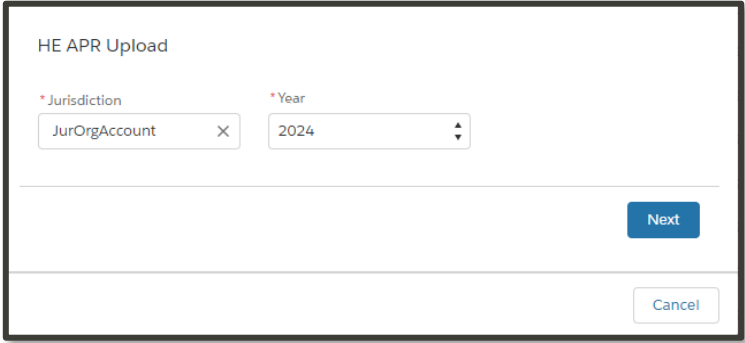
Steps	Screenshot Examples
1. Navigate to the <b>HE/APR Upload</b> tab.	 A screenshot of the hcdconnect website's navigation bar. The 'HE/APR Upload' tab is highlighted with a red box. Below the navigation bar, there are three buttons: 'Upload APR', 'Upload Housing Element', and 'Upload Sites Inventory'. Underneath these buttons are three tabs: 'APR Import', 'Housing Element', and 'Site Inventory'. The 'APR Import' tab is currently selected and highlighted with a blue underline.
2. Click on the <b>APR Import</b> tab.	 A screenshot of the hcdconnect website's sub-navigation bar. The 'APR Import' tab is highlighted with a red box. Below the sub-navigation bar, there are three buttons: 'Upload APR', 'Upload Housing Element', and 'Upload Sites Inventory'. Underneath these buttons are three tabs: 'APR Import', 'Housing Element', and 'Site Inventory'. The 'APR Import' tab is currently selected and highlighted with a blue underline.

# APR Import List View

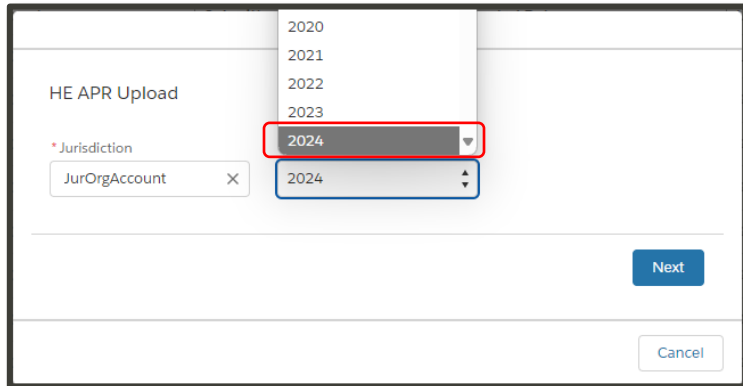
Steps	Screenshot Examples														
<p>1. In the APR Import List View, you are able to see previous APR submissions. Click on the hyperlinks under the <b>HE APR Import</b> column to open a specific file..</p>	 <table border="1"><thead><tr><th>APR Import Name</th><th>Ye...</th><th>Account</th><th>Submitter</th><th>Created Date</th><th>Last Modified Da...</th><th>Process...</th></tr></thead><tbody><tr><td>1 AGOURA HILLS - 10/15/2021 - 1...</td><td>2023</td><td>AGOURA HILLS</td><td>Kaleem Mohammed</td><td>9/26/2024, 11:30 AM</td><td>10/14/2024, 4:53 PM</td><td>Success</td></tr></tbody></table>	APR Import Name	Ye...	Account	Submitter	Created Date	Last Modified Da...	Process...	1 AGOURA HILLS - 10/15/2021 - 1...	2023	AGOURA HILLS	Kaleem Mohammed	9/26/2024, 11:30 AM	10/14/2024, 4:53 PM	Success
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<p>2. Use the <b>search bar</b> to search for a previous submission.</p>	 <table border="1"><thead><tr><th>APR Import Name</th><th>Ye...</th><th>Account</th><th>Submitter</th><th>Created Date</th><th>Last Modified Da...</th><th>Process...</th></tr></thead><tbody><tr><td>1 AGOURA HILLS - 10/15/2021 - 1...</td><td>2023</td><td>AGOURA HILLS</td><td>Kaleem Mohammed</td><td>9/26/2024, 11:30 AM</td><td>10/14/2024, 4:53 PM</td><td>Success</td></tr></tbody></table>	APR Import Name	Ye...	Account	Submitter	Created Date	Last Modified Da...	Process...	1 AGOURA HILLS - 10/15/2021 - 1...	2023	AGOURA HILLS	Kaleem Mohammed	9/26/2024, 11:30 AM	10/14/2024, 4:53 PM	Success
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**Note:** 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.

# How to Upload an APR File

Steps	Screenshot Examples
<p>1. Click on the <b>HE/APR Upload</b> tab from the navigation bar at the top of the screen.</p>	 <p>The screenshot shows the top navigation bar of the hcdconnect application. The 'HE/APR Upload' tab is highlighted in blue. Below the navigation bar, there are three buttons: 'Upload APR', 'Upload Housing Element', and 'Upload Sites Inventory'. The 'APR Import' tab is also visible in the lower navigation bar.</p>
<p>2. Click on the <b>Upload APR</b> button.</p>	 <p>The screenshot shows the hcdconnect interface with the 'HE/APR Upload' tab selected. The 'Upload APR' button is highlighted with a red rectangular box. Below the buttons, there is a section for 'APR Imports' with a dropdown menu set to 'All'.</p>
<p>3. Select the appropriate <b>Jurisdiction</b> in which you want to upload an APR.</p> <p><i>Note:</i> If a consultant is associated with multiple jurisdictions, the consultant will be able to choose between a list of jurisdictions that they are associated.</p>	 <p>The screenshot shows the 'HE APR Upload' form. It has two input fields: '*Jurisdiction' with the value 'JurOrgAccount' and an 'X' to clear it, and '*Year' with the value '2024' and a dropdown arrow. There are 'Next' and 'Cancel' buttons at the bottom right of the form.</p>

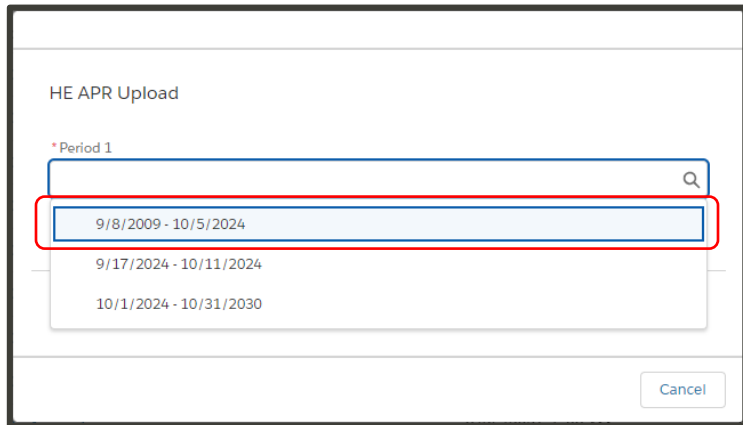
4. Select appropriate **Year**.



The screenshot shows the 'HE APR Upload' form. A dropdown menu is open, displaying years from 2020 to 2024. The year 2024 is highlighted with a red box. Below the dropdown, there is a 'Jurisdiction' field with a dropdown menu also showing 2024, also highlighted with a red box. A 'JurOrgAccount' field with a clear button (X) is visible. At the bottom right, there are 'Next' and 'Cancel' buttons.

5. Click **Next**.

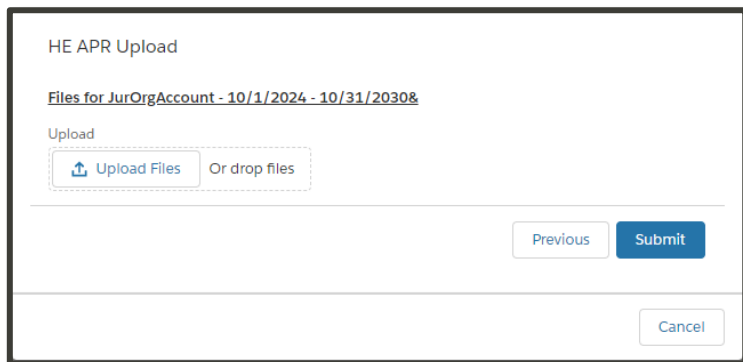
6. Select the appropriate **Period**. Period displays all time periods that fall under the year selected that are tied to the jurisdiction's Council of Governments (COG). In years that span two planning periods, the same APR submission should be associated with both periods.



The screenshot shows the 'HE APR Upload' form. A search bar labeled '\* Period 1' is present. Below it, a list of time periods is displayed: '9/8/2009 - 10/5/2024', '9/17/2024 - 10/11/2024', and '10/1/2024 - 10/31/2030'. The first period, '9/8/2009 - 10/5/2024', is highlighted with a red box. A 'Cancel' button is located at the bottom right.

7. Click **Next**.

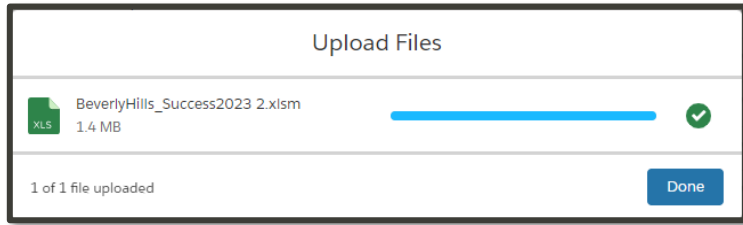
8. Click on **Upload Files**. Select the file you want to upload from your computer.



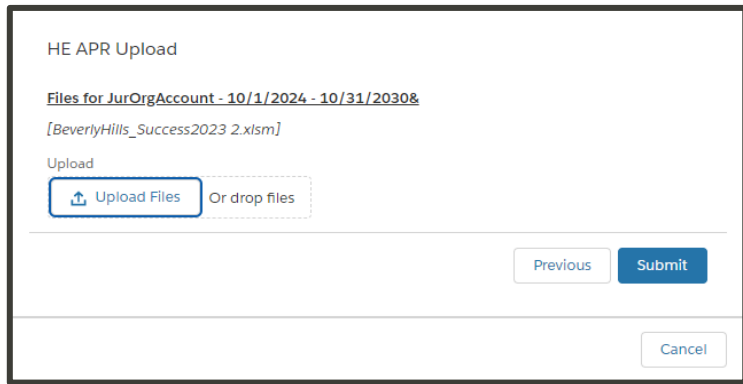
The screenshot shows the 'HE APR Upload' form. It displays the text 'Files for JurOrgAccount - 10/1/2024 - 10/31/2030&'. Below this, there is an 'Upload' section with a button labeled 'Upload Files' and the text 'Or drop files'. At the bottom right, there are 'Previous', 'Submit', and 'Cancel' buttons.



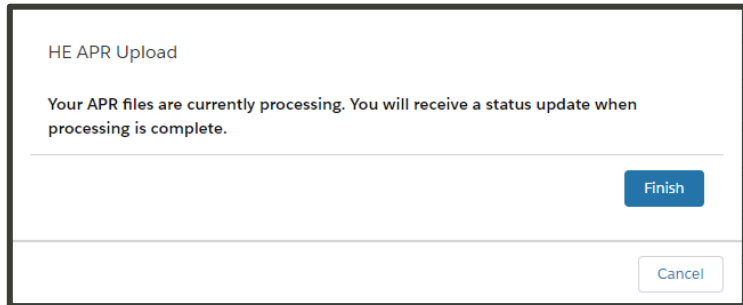
9. Once selected and uploaded, Click on **Done**.



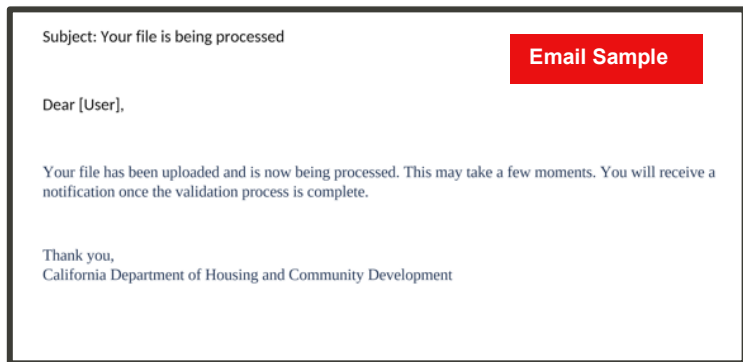
10. Click on **Submit**.



11. You will receive a notification that the APR files are currently processing. It takes up to 10 minutes for the system to process the file. You will receive a notification when processing is complete. Click on **Finish**.



12. Once you have successfully uploaded your APR file into the system, you will receive an email notification informing you that your file is being processed by the system.



# APR Submission Processing

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.

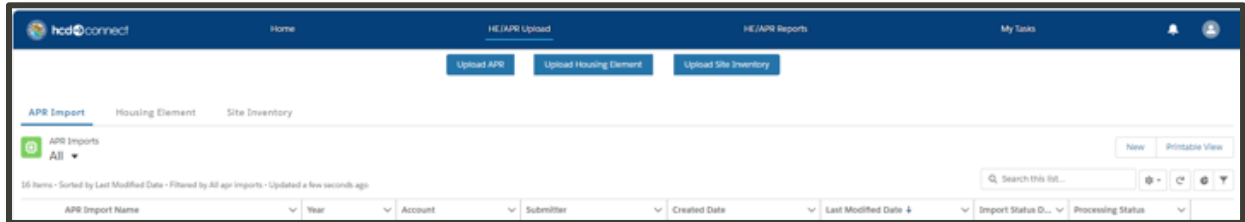


**Note:** The **Processing Status** indicates that the file is processing, and it may take up to 10 minutes for the system to process the file.

# HE APR Imports Record – List View

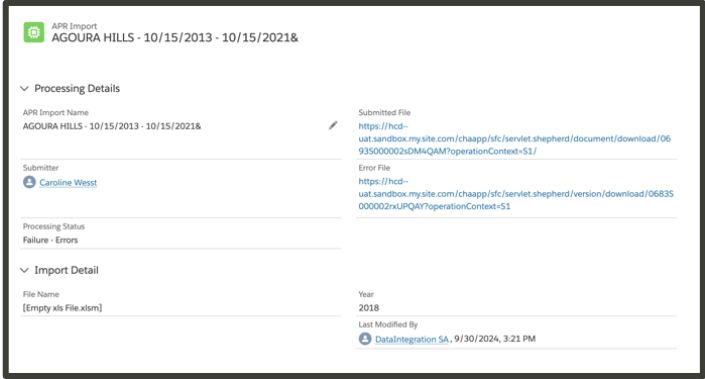
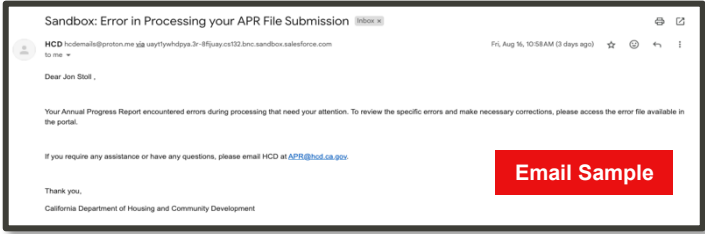
The APR file uploaded is now available under the **APR Imports** List View.

To access the APR Imports List View, click on the **HE/APR Upload** tab from the navigation bar at the top of the page.



**Note:** Make sure that the **APR Imports** tab is selected. Within the APR Imports List View, you'll be able to see a list of previously submitted APR files.

# Resolving APR Upload Errors

Steps	Screenshot Examples
<p>1. Once you have submitted the APR file, the file will then be processed.</p>	 <p>The screenshot shows an APR Import record for 'AGOURA HILLS - 10/15/2013 - 10/15/2021&amp;'. Under 'Processing Details', the 'Submitted File' is listed with a URL. The 'Error File' is also listed with a URL. The 'Processing Status' is 'Failure - Errors'. Under 'Import Detail', the 'File Name' is '[Empty xls File.xlsx]' and the 'Year' is '2018'. The 'Last Modified By' is 'DataIntegration SA, 9/30/2024, 3:21 PM'.</p>
<p>2. If there is an error in the file, you will receive an email notification that will prompt you to navigate to the APR Import record and view the APR Error file.</p>	 <p>The screenshot shows an email notification from HCD titled 'Sandbox: Error in Processing your APR File Submission'. The email is addressed to 'Dear Jon Stot' and contains the text: 'Your Annual Progress Report encountered errors during processing that need your attention. To review the specific errors and make necessary corrections, please access the error file available in the portal.' Below this, it says 'If you require any assistance or have any questions, please email HCD at <a href="mailto:APR@hcd.ca.gov">APR@hcd.ca.gov</a>'. A red button labeled 'Email Sample' is visible in the bottom right corner.</p>

**Note:** On the HE APR Import record, you can see that the processing status is now reporting **Failure - Errors** and there is a URL link in the **Error File** that can be opened and downloaded to view.

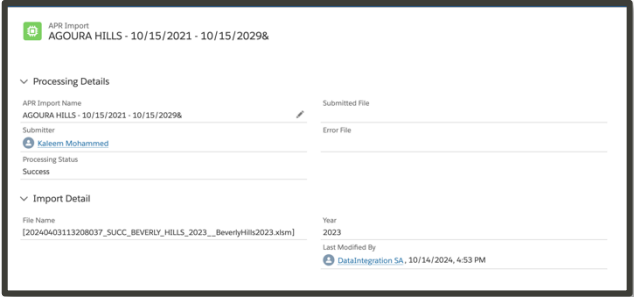
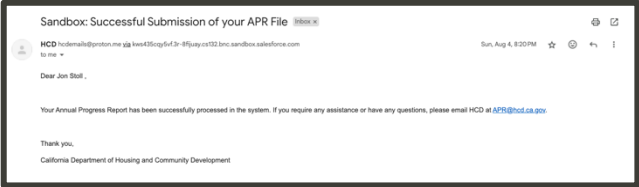
## Resubmitting an Updated APR File

After you fix the error in the file, you can resubmit the updated APR file by following the same process as when you conducted the initial upload.

**Note:** Error files are deleted from the system after you have updated the corrected file.

The process of resubmitting an APR file can continue until the file has been successfully processed. You will see that the Processing Status has updated to **'Success'**.

# Confirmation of a Successful APR Submission

Steps	Screenshot Examples
<p>1. Once you have submitted or re-submitted the APR file, the file will then be processed. Once the file is processed and the validation passes, you will receive an email notification that the file was processed successfully.</p>	 <p>The screenshot shows a system record for an APR Import. The title is "APR Import AGOURA HILLS - 10/15/2021 - 10/15/2029&amp;". Under "Processing Details", the "Submitted File" field is populated with a file name, and the "Error File" field is empty. The "Processing Status" is "Success". Under "Import Detail", the "File Name" is "[20240403113208037_SUCC_BEVERLY_HILLS_2023_BeverlyHills2023.xml]" and the "Year" is "2023". The record was last modified by "DataIntegration SA" on 10/14/2024 at 4:53 PM.</p>
<p>2. Once the final review has been conducted by HCD staff, you will not be able to upload an APR for the same year. Please contact your HCD rep for further questions and instructions.</p>	 <p>The screenshot shows an email notification. The subject is "Sandbox: Successful Submission of your APR File". It is from "HCD" to "Jon Staff" and was received on "Sun, Aug 4, 8:20 PM". The body of the email says: "Dear Jon Staff, Your Annual Progress Report has been successfully processed in the system. 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."</p>
<p>3. You can also navigate to the HE Import record to view the status of the submitted file. Submitted files can be downloaded using the URL in the Submitted File field.</p>	

# HE/APR Reports

To access and view detailed reports on APR submissions, click on the 'HE/APR Reports' tab.

The screenshot shows a web application interface for 'APR Submission History and Detail'. At the top, there are navigation tabs for 'Home', 'HE/APR Upload', 'HE/APR Reports', and 'My Tasks'. Below the title, there are two dropdown menus for 'Jurisdiction' (set to 'All') and 'Planning Period' (set to 'All'). The main content is a table with the following data:

Jurisdiction	Year	Created Date	Last Modified Date	Cycle	File Name	Planning Period Start Date	Planning Period End Date
ADELANTO	2018	11/21/2019 8:50:08 AM	5/22/2024 7:53:55 PM	5A	Adelanto2018.xlsm	10/15/2013	10/15/2021
AGOURA HILLS	2018	4/5/2019 9:12:12 AM	5/22/2024 7:54:02 PM	5A	AgouraHills2018.xlsm	10/15/2013	10/15/2021
ALAMEDA	2018	2/29/2024 3:00:22 PM	5/22/2024 7:54:34 PM	5B	Alameda2018.xlsm	1/31/2015	1/31/2023
ALAMEDA COUNTY	2018	6/13/2019 4:13:38 PM	5/22/2024 7:53:55 PM	5B	AlamedaCounty2018.xlsm	1/31/2015	1/31/2023
ALBANY	2018	5/29/2019 11:12:34 AM	5/22/2024 7:53:55 PM	5B	Albany2018.xlsm	1/31/2015	1/31/2023
ALHAMBRA	2018	3/16/2023 9:56:38 AM	5/22/2024 7:54:10 PM	5A	Alhambra2018.xlsm	10/15/2013	10/15/2021
ALISO VIEJO	2018	5/16/2019 8:59:58 AM	5/22/2024 7:53:55 PM	5A	AlisoViejo2018.xlsm	10/15/2013	10/15/2021
ALPINE COUNTY	2018	6/17/2019 9:23:18 AM	5/22/2024 7:53:59 PM	5F	AlpineCounty2018.xlsm	6/30/2014	6/30/2019
ALTURAS	2018	10/14/2019 3:00:03 PM	5/22/2024 7:54:02 PM	5F	Alturas2018.xlsm	6/30/2014	6/30/2019
AMADOR COUNTY	2018	5/29/2019 1:25:00 PM	5/22/2024 7:53:57 PM	5J	AmadorCounty2018.xlsm	6/30/2014	9/15/2021
AMERICAN CANYON	2018	4/26/2019 1:45:41 PM	5/22/2024 7:53:57 PM	5B	AmericanCanyon2018.xlsm	1/31/2015	1/31/2023
ANAHEIM	2018	5/21/2019 10:10:47 AM	5/22/2024 7:53:59 PM	5A	Anaheim2018.xlsm	10/15/2013	10/15/2021
ANDERSON	2018	6/5/2019 9:04:28 AM	5/22/2024 7:53:59 PM	5G	Anderson2018.xlsm	6/30/2014	4/15/2020
ANGELS CAMP	2018	5/28/2019 10:22:39 AM	5/22/2024 7:53:55 PM	5F	AngelsCamp2018.xlsm	6/30/2014	6/30/2019
ANTIOCH	2018	6/5/2019 2:10:30 PM	5/22/2024 7:53:59 PM	5B	Antioch2018.xlsm	1/31/2015	1/31/2023
APPLE VALLEY	2018	10/11/2019 2:14:49 PM	5/22/2024 7:53:59 PM	5A	AppleValley2018.xlsm	10/15/2013	10/15/2021
ARCADIA	2018	4/5/2019 3:06:27 PM	5/22/2024 7:53:55 PM	5A	Arcadia2018.xlsm	10/15/2013	10/15/2021
ARCATA	2018	9/27/2019 1:12:05 PM	5/22/2024 7:54:02 PM	5F	Arcata2018.xlsm	6/30/2014	6/30/2019
ARROYO GRANDE	2018	5/15/2019 9:15:22 AM	5/22/2024 7:53:55 PM	5I	ArroyoGrande2018.xlsm	6/30/2014	12/31/2020

The dashboard summarizes and displays data submitted on the APRs.

You can filter by the appropriate **Jurisdiction** you have access to and **Planning Period** to view and analyze the embedded Power BI reports.