Jurisdiction Registration and Consultant Management

California Department of
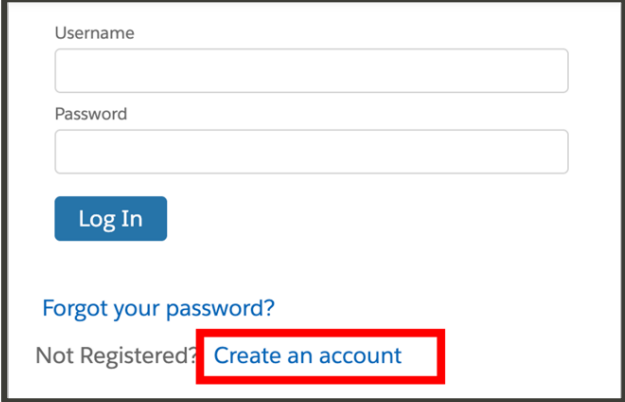**Housing and Community Development**
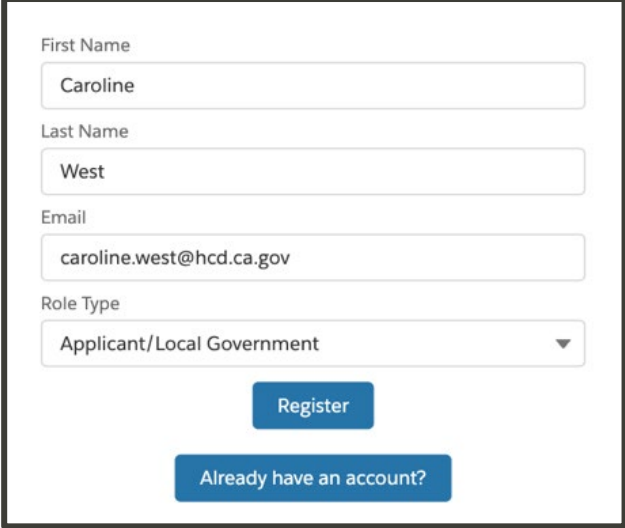
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Learning Objectives

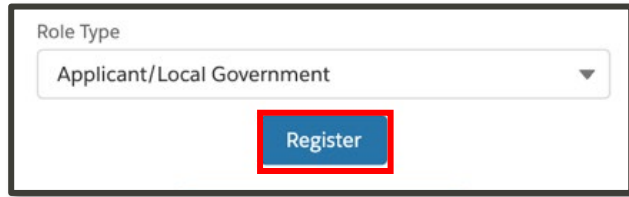At the end of this module, the learner will be able to:

- Start a New Registration
- Search for Your Jurisdiction
- 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
- Change Your Password
- Add or Remove 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**

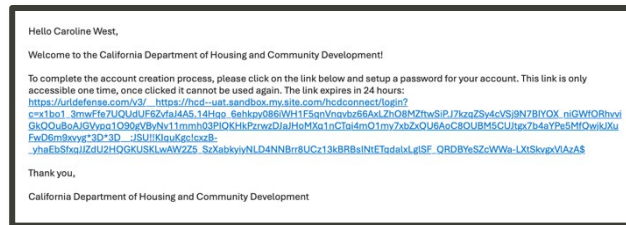5. You will be taken to the Check Your Email screen. An email has been sent to the email address you entered.

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

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.
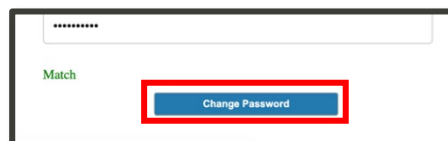
8. Click the **Change Password** button to proceed.
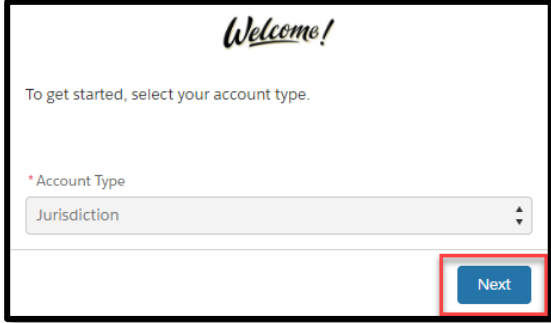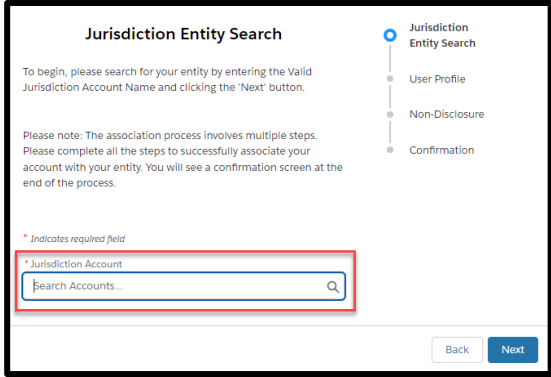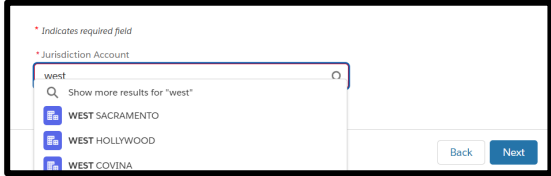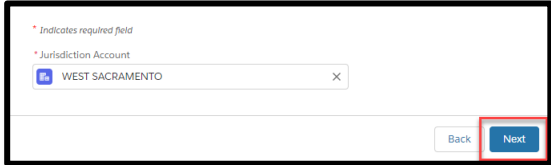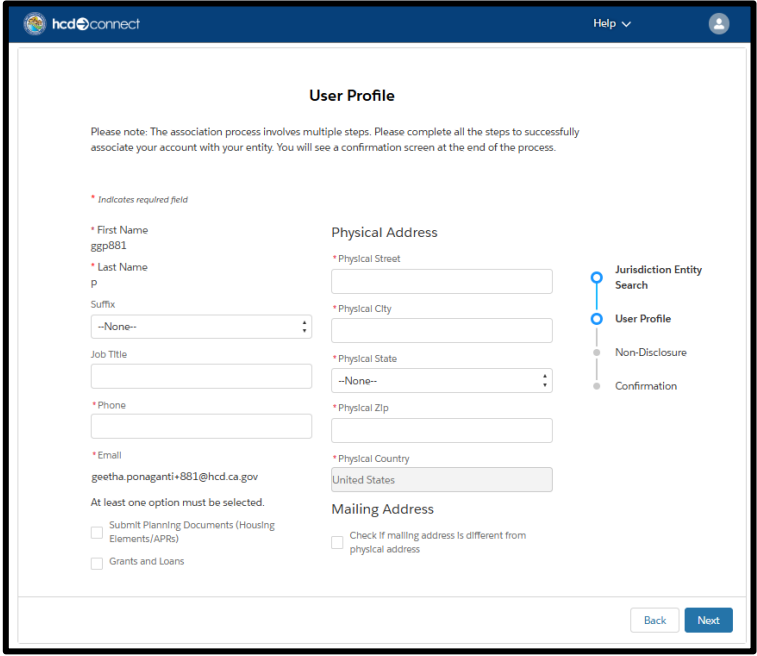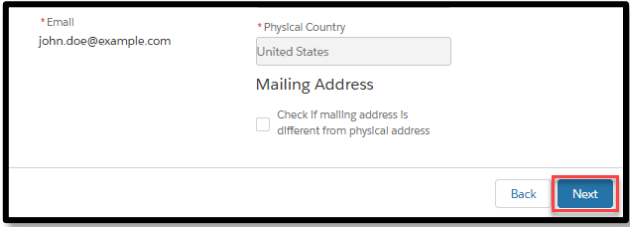
Portal Registration: Jurisdiction Search
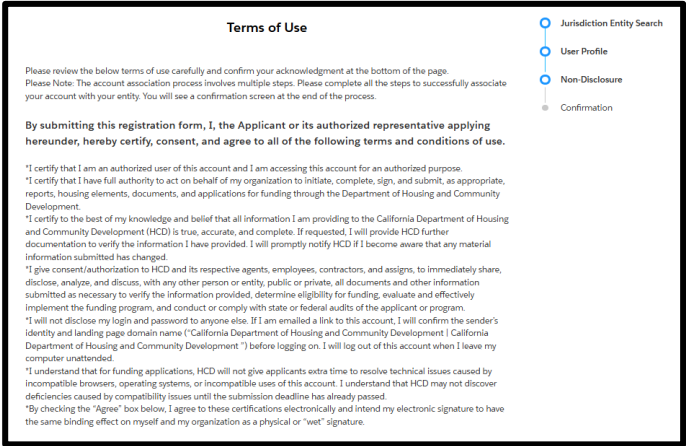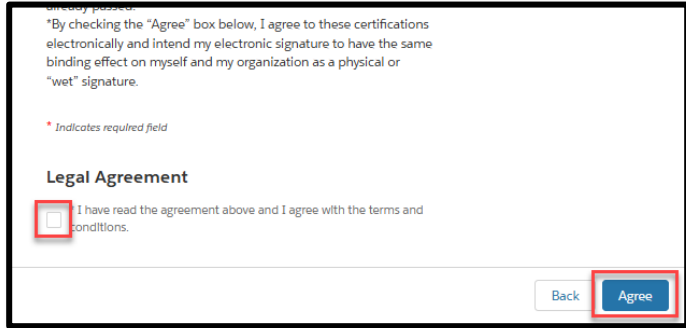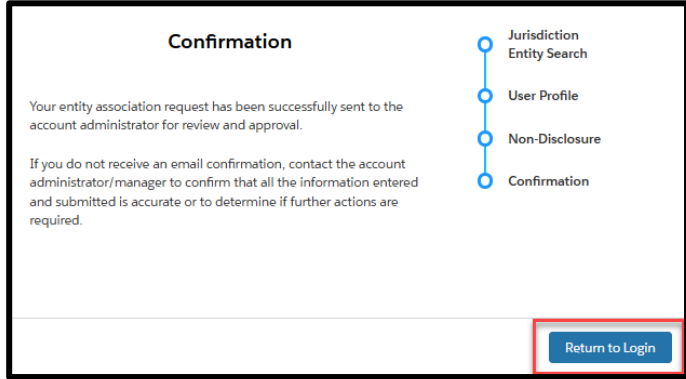
Steps	Screenshot Examples
1. Once you have created a password, you will be taken to the Portal's welcome screen. **Please Note:** Cities and Counties should select "**Jurisdiction**" as the account type. For other entities that are not Cities and Counties, please refer to the registration guide for Organization and Tribal entities. Click **Next** to continue.	*Welcome!* To get started, select your account type. * Account Type Jurisdiction Next
2. You will then reach the Jurisdiction Entity Search screen.	**Jurisdiction Entity Search** ○ Jurisdiction Entity Search To begin, please search for your entity by entering the Valid Jurisdiction Account Name and clicking the 'Next' button. • 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. • Non-Disclosure • Confirmation * Indicates required field * Jurisdiction Account Search Accounts... Back Next
3. Select your jurisdiction from the drop-down list and make sure that your jurisdiction is selected in the field.	* Indicates required field * Jurisdiction Account west Q Show more results for "west" WEST SACRAMENTO WEST HOLLYWOOD WEST COVINA Back Next
4. Click **Next** to continue.	* Indicates required field * Jurisdiction Account WEST SACRAMENTO × Back Next

Portal Registration: User Profile

Enter in your information into the User Profile page.

Steps	Screenshot Examples
1. Enter in the following information: • **Job Title** • **Phone** • **Physical Address** – enter in your business address. • **Mailing Address** – Select if mailing address is different than your physical address. • **At least one option must be selected** – Select one of the check boxes as per the program. **Please Note:** Select "Submit Planning Documents" if you intend to submit Housing Elements, Annual Progress Reports, or Sites Inventory on behalf of your jurisdiction. Select "Grants and Loans" if you intend to submit an application for HCD's loan or grant programs.	
2. Click **Next** to continue.	
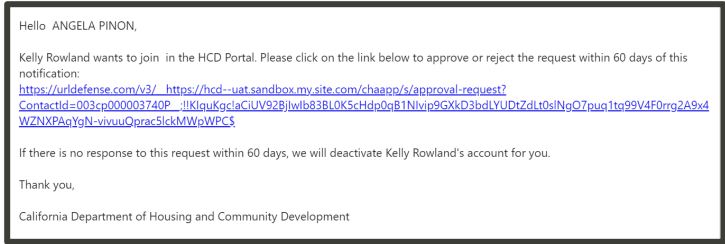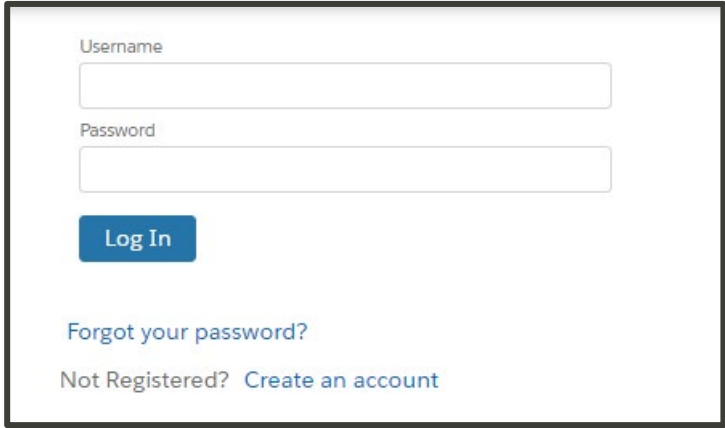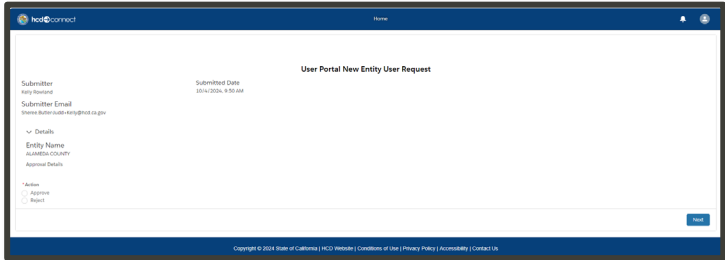
Portal Notification: Complete Your Registration

Steps	Screenshot Examples
1. To complete your registration, you must read and accept the non--disclosure agreement.	
2. Click the checkbox under Legal Agreement. Then, click the **Agree** button.	
3. You will then reach a confirmation screen. Your registration is pending approval from the Jurisdiction Account Administrator or HCD. If an Account Administrator is identified for the jurisdiction you are registering with, you will see the message displayed on the right. Click **Return to Login**.	

Portal Registration: Approve/Reject New Entity Join Request

The Account Administrator for your jurisdiction will receive an email indicating that a user is requesting to join the HCD Connect User Portal for your jurisdiction. If you are the Account Administrator and receive this notification, follow these steps to approve or reject the requesting user.
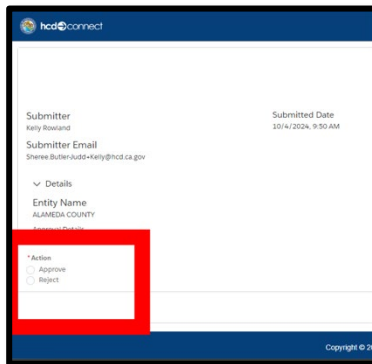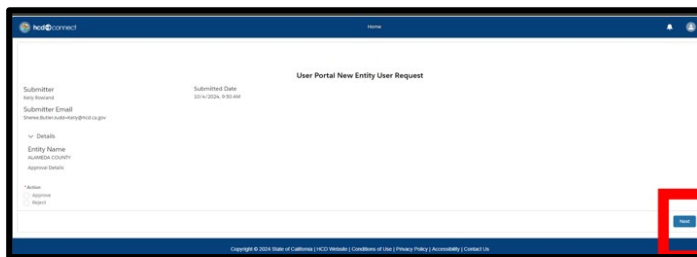
| Steps	Screenshot Examples
1. Click on the email received from HCD Connect.	Hello ANGELA PINON, Kelly Rowland wants to join in the HCD Portal. Please click on the link below to approve or reject the request within 60 days of this notification: https://urldefense.com/v3/__https://hcd--uat.sandbox.my.site.com/chaapp/s/approval-request?ContactId=003cp000003740P__;!!KlquKgc!aCiUV92BjIwIb83BL0K5cHdp0qB1NIvip9GXkD3bdLYUDtZdLt0slNgO7puq1tg99V4F0rrg2A9x4WZNXPAqYgN-vivuuQprac5lckMWpWPC$ If there is no response to this request within 60 days, we will deactivate Kelly Rowland's account for you. Thank you, California Department of Housing and Community Development
2. You will need to be logged into the HCD Connect User Portal. You will be directed to the login screen. Enter in your username and password to enter the portal and click **'Log In.'**	Username Password Log In Forgot your password? Not Registered? Create an account
3. The User Portal New Entity User Request screen will open.	User Portal New Entity User Request Submitter / Submitted Date Entity Name Approval Details Action: Approve / Reject

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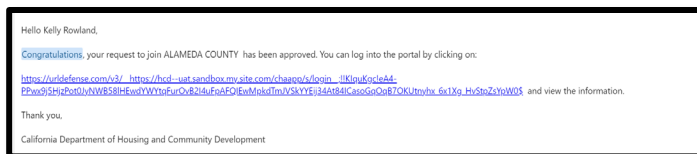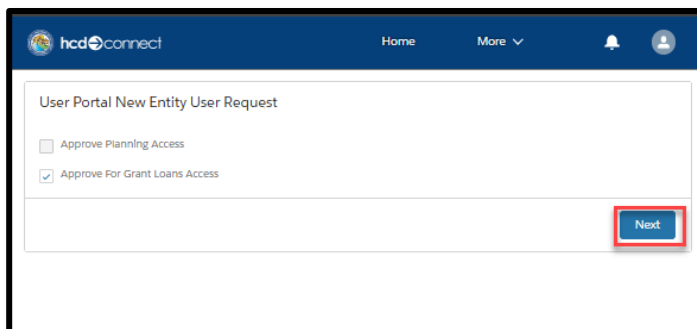
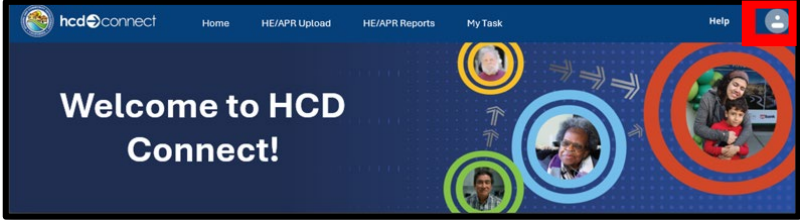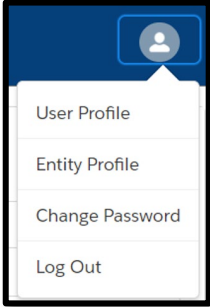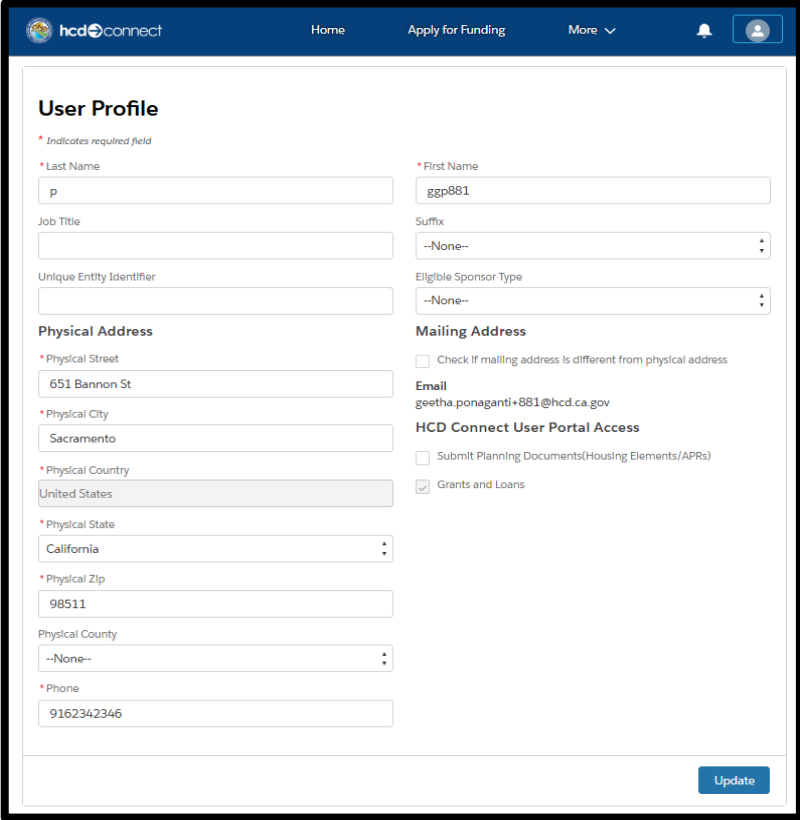7. If you select **Reject**, then the user will not get access to the Portal.

User Portal New Entity User Request

REJECTED

Submitter	Submitted Date
Kelly Rowland	10/4/2024, 9:50 AM

⌄ Details

Approval Details

Submitter Email	Entity Name
sheree.butler-judd+kelly@hcd.ca.gov	ALAMEDA COUNTY

Next

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,

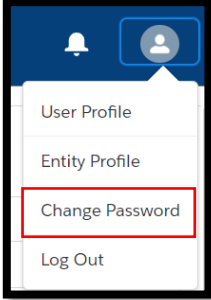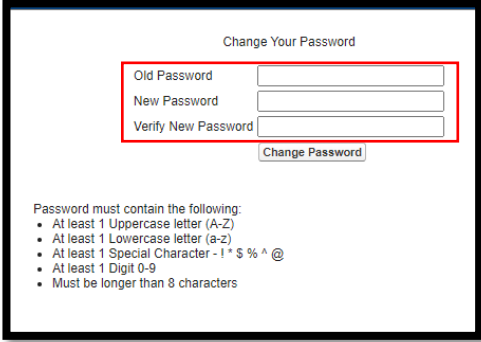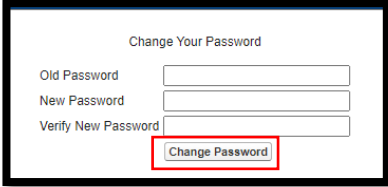California Department of Housing and Community Development

Manage Your User Account

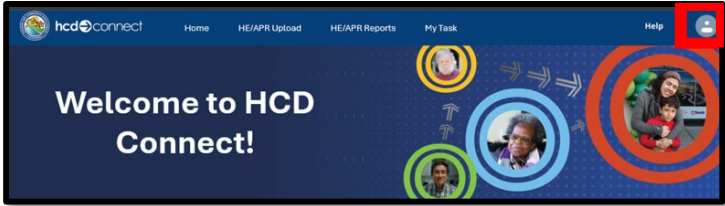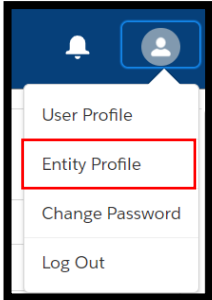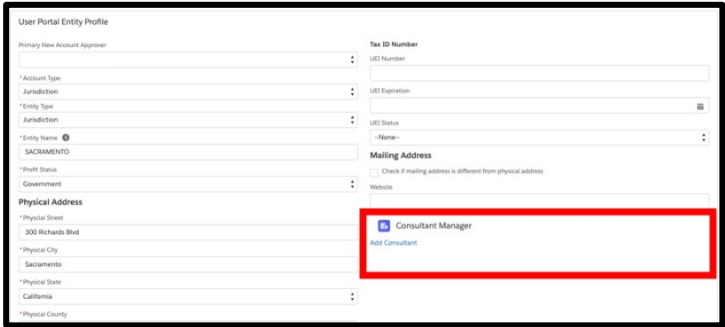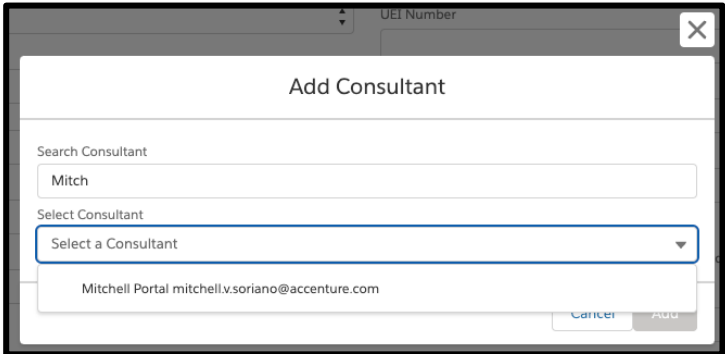| Steps	Screenshot Examples
1. To manage your user account details, click on the profile icon on the top right of the navigation bar.	
2. Click on **User Profile.**	
3. You can view your user information on the User Profile page. If you need to update any information, enter any updates in the fields on the page then click the **Update** button at the bottom right of the screen.	

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

Change Your Password

Steps	Screenshot Examples
1. Click on **Change Password** to process a password change request.	
2. On the Change Your Password screen, enter in your old password and your new desired password.	
3. Then click the **Change Password** button.	

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

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

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.

   UEI Number

   ### Add Consultant

   Search Consultant

   Mitch

   Select Consultant

   Mitchell Portal mitchell.v.soriano@accenture.com

   Cancel   Add

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.

   Website

   Consultant Manager

   Add Consultant

   Consultant Name

   Mitchell Portal   Remove

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

   Website

   Consultant Manager

   Add Consultant

   Consultant Name

   Mitchell Portal   Remove