# 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	$\leftarrow \rightarrow$ C $\widehat{\mathbf{C}}$ (S https://hcd.my.site.com/hcdconnect
2. Click Create an Account	Username Password Username Torgot your password? Not Registered? Create an account
3. Enter your First Name, Last Name, Email, and select the Role Type "Applicant/Local Government".	First Name Caroline Last Name West Email caroline.west@hcd.ca.gov Role Type Applicant/Local Government Register Already have an account?

4.	Then click <b>Register</b>	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 in <i>minitor</i> 2004/0000000000000000000000000000000000
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@hed.ca.gov. Make sure to include a lane. P & character P & character P & character P & character P & character C & character C & character Mach C Charge Password
8.	Click the <b>Change Password</b> button to proceed.	Match Change Password

## **Portal Registration: Jurisdiction Search**

St	eps	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         To begin, please search for your entify 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         * Indicates required field         * Indicates required field         * Jurisdiction Account         Back
3.	Select your jurisdiction from the drop-down list and make sure that your jurisdiction is selected in the field.	
4.	Click <b>Next</b> to continue.	* Indicates required field * Jurisdiction Account WEST SACRAMENTO X 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.

⊖connect		Help 🗸	(
Please note: The association process involves associate your account with your entity. You w	User Profile multiple steps. Please complete all the steps to successfu III see a confirmation screen at the end of the process.	ılly	
• Indicates required field			
* First Name ggp881	Physical Address * Physical Street		5.00
P Suffix		Search	Entity
None	* Physical City	User Profile	
Job Title	* Physical State	Non-Disclosu	ure
* Phone	Physical ZIp	<ul> <li>Contirmation</li> </ul>	1
*Email	Physical Country		
geetha.ponaganti+881@hcd.ca.gov At least one option must be selected.	United States Mailing Address		
Submit Planning Documents (Housing Elements/APRs)	Check If malling address is different from physical address		
Grants and Loans			

*Emall john.doe@example.com	* Physical Country United States	
	Mailing Address Check If malling address Is different from physical address	
		Back

## **Portal Notification: Complete Your Registration**

Steps		Screenshot Examples	
1.	To complete your registration, you must read and accept the nondisclosure agreement.	Lemma of Lamma o	ity Search
2.	Click the checkbox under Legal Agreement. Then, click the <b>Agree</b> button.	<ul> <li>"By checking the "Agree" box below, I agree to these certifications electronically and intend my electronic signature to have the same binding effect on myself and my organization as a physical or "wet" signature.</li> <li>Indicates required field</li> <li>Legal Agreement</li> <li>I have read the agreement above and I agree with the terms and conditions.</li> </ul>	Agree
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 <b>Return to Login</b> .	Confirmation       Jurisdiction         Your entity association request has been successfully sent to the account administrator for review and approval.       User Profile         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.       Confirmation	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
<ol> <li>Click on the email received from HCD Connect.</li> </ol>	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/s3/_https://hcd=uat.sandbox.my.site.com/chaano/s/approval-request?         Contactid=0028;p00003740Pilkloukg-laciUv928]wib838L0KScHdp0nB1NivipSGXkD3bdtYUDrZdtt0sINg07pug1to99V4F0rrg2A9x4         WZNXPRAYGN-www.Oprac5ickMWoWPC5         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
<ol> <li>You will need to be logged into the HCD Connect User Portal. You will be directed to the login screen.</li> <li>Enter in your username and password to enter the portal and click 'Log In.'</li> </ol>	Username Password Log In Forgot your password? Not Registered? Create an account
3. The User Portal New Entity User Request screen will open.	Image: Construction of the construc

4. Under Action, you can select **Approve** or **Reject**. licd⊜connect Submitted Date 10/4/2024, 9:50 AM ubmitter Submitter Email 5. Click Next to complete the action. User Portal New Entity User Re 6. If you select Approve and A. Mod⊖connect More 🗸 click Next, you will then reach a User Portal New User Portal New Entity User Request Entity User Request screen. Click **Next** to complete the Approve Planning Access Approve For Grant Loans Access action. Requesting user will receive an email notification that their access has been granted. 🛞 hed . . Submitted Date 20(4/2024, 9:50 AM llo Kelly Rowland v3/ https://hcd-o/s/login\_:!!KlguKgc!eA4 mia Department of Housing and Community Development

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

	User Portal New Entity User Request		
nt 222	REJECTED		
00010	Kelly Rowland	Submitted Date 10/4/2024, 9:50 AM	
	✓ Details		
	Approval Details		
	Submitter Email	Entity Name	
	a server build - julia - Menyle marca gov	ADDIEDR CODATT	
		No	
	Hello Kelly Boxland		
	Hello Kelly Rowland,		
	Helio Kelly Rowland,		
	Hello Kelly Rowland, Your request to access ALAMEDA COUNT	and the context set of approved. If you feel you have received this message in error, please contact Sheree HCD Test, sheree butter-	
	Hello Kelly Rowland, Your request to access ALAMEDA COUNT judd+test@hcdt.agov for assistance.	re Y in HCD Connect was not approved. If you feel you have received this message in error, please contact Sheree HCD Test, sheree-butler-	
	Hello Kelly Rowland, Your request to access ALAMEDA COUNT juid3+test@hcd.ca.gov for assistance.	14 Y in HCD Connect was not approved. If you feel you have received this message in error, please contact Sheree HCD Test, sheree.butler-	
	Hello Kelly Rouland, Your request to access ALAMEDA COUNT judd+test@hcd.ca.gov for asistance. Thank you,	T Y in HCD Connect was not approved. If you feel you have received this message in error, please contact Sheree HCD Test, sheree buffer-	

## Manage Your User Account

Steps	Screenshot Examples
<ol> <li>To manage your use account details, click on the profile icon of the top right of the navigation bar.</li> </ol>	And the Medean and the Medean and Medea Medan and Medean and Medea
2. Click on <b>User</b> <b>Profile.</b>	User Profile Entity Profile Change Password Log Out
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 <b>Updat</b> button at the bottom right of the screen.	Image: Note Second text       Home       Apply for Funding       More ∨       Image: Note Second text         User Profile       • Indicates required field       • Indicates required field       • Indicates required field       • Indicates required field         • Last Name       • Prist Name       ggp881       • Indicates required field       • Indicates required field       • Indicates required field         Job Title       ggp881       • Indicates suffix       • None-•       • None-•       • Indicates field         Job Title       • Indicates field       • None-•       • Indicates field       • None-•       • None-•       • Indicates field         • Unique Entity Identifier       Eligible Sponsor Type       • None-•

\* Physical Country

United States
\* Physical State

California
\* Physical Zlp
98511
Physical County

--None--\* Phone 9162342346 Submit Planning Documents(Housing Elements/APRs)

Grants and Loans

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

hcd Ocnnect	Home	HC/APR Upload	HE/AFR Reports	My Tasks	۰	
User Profile						
Your changes have been saved.						
						0 ose
		Copyright @ 2024 State of California   HCD Website   Conditions of	Jse   Privacy Policy   Accessibility   Contact Us			

## Change Your Password

Steps	Screenshot Examples
1. Click on <b>Change Password</b> to process a password change request.	User Profile Entity Profile Change Password Log Out
<ol> <li>On the Change Your Password screen, enter in your old password and your new desired password.</li> </ol>	Change Your Password          Old Password         New Password         Verify New Password         Change Password         Change Password         Ressword must contain the following:         • At least 1 Uppercase letter (A-2)         • At least 1 Special Character -! * \$ % ^ @         • At least 1 Digit 0-9         • Must be longer than 8 characters
3. Then click the <b>Change Password</b> button.	Change Your Password Old Password New Password Verify New Password Change Password

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

Steps	Screenshot Examples
<ol> <li>Click on the profile icon on the top right of the navigation bar.</li> </ol>	image: weight of the second
2. Click on <b>Entity Profile</b> .	User Profile Entity Profile Change Password Log Out
3. Locate the Consultant Manager and click <b>Add</b> <b>Consultant.</b>	User Portal Entity Pontle       Permay New Account Agroums       - Account Agroums
<ul> <li>4. Type in the consultant's name in the Search Consultant bar and click on the Select Consultant field to see the results.</li> <li>You will be able to search by name and/or email.</li> </ul>	UEI Number  Add Consultant  Search Consultant  Mitch Select Consultant Select Consultant  Mitchell Portal mitchell.v.soriano@accenture.com  Carrier Auu

<ol> <li>Select the confrom the list a Add.</li> <li>Note: if you contain the consultant they have no registered. Printstruct them to the portal.</li> </ol>	onsultant and click to not see nt in the list, t yet lease to register	UEI Number  Add Consultant  Add Consultant  Mitch Select Consultant  Mitchell Portal mitchell.v.soriano@accenture.com  Cancel Add
<ol> <li>Once added, consultant withe Consultant The user will email once the been added.</li> <li>The consultant access to you and can subre documents of your jurisdict view previous submissions.</li> </ol>	the ill appear in nt Manager. receive an ney have nt now has ur account mit planning n behalf of ion and can s	Website Consultant Manager Add Consultant Consultant Name Mitchell Portal Remove
7. To remove a access to you jurisdiction at the <b>Remove</b>	consultant's ur ccount, click button.	Website  Consultant Manager  Add Consultant Consultant Name  Mitchell Portal  Remove