rIhousing

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Welcome to Procorem!

January 18, 2024

An introduction for Developers and Development Teams. Owners, syndicators, investors, and architects are welcome to attend.

RIHousing has partnered with ProLink Solutions for the purpose of monitoring multifamily developments

- RIHousing Development staff will be using ProLink going forward
  - Underwriting
  - Design & Construction
- Owners, agents, and more will access procorem

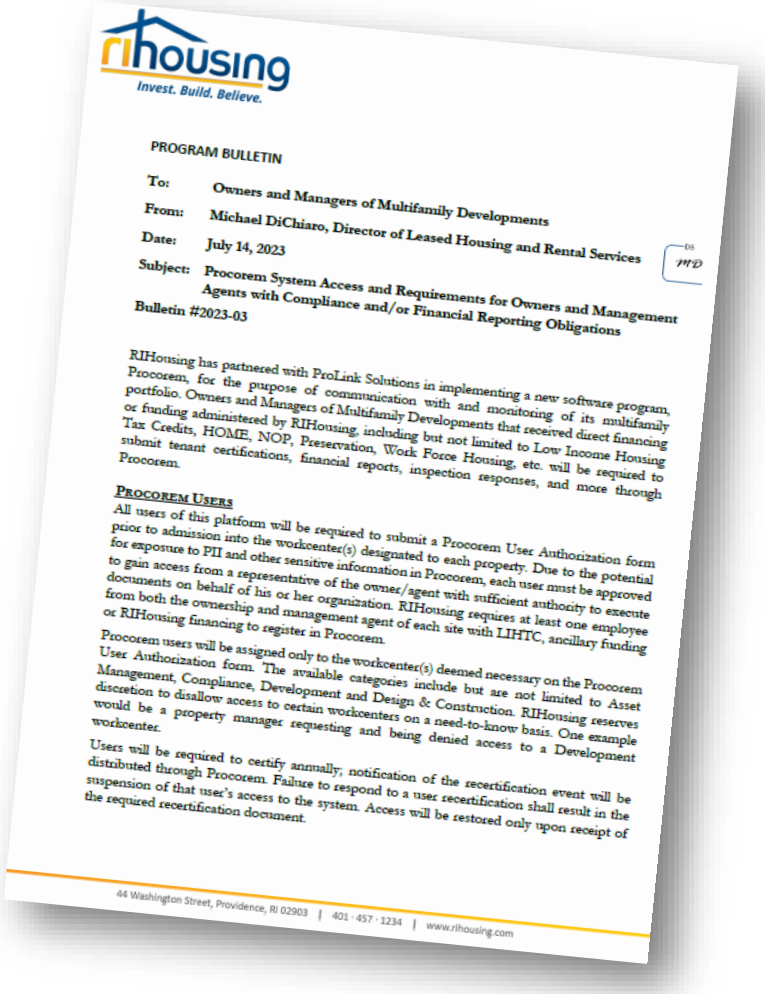
procorem

PROLINK™ SOLUTIONS

ProLink recommends Google Chrome for best results, but Microsoft Edge will work too.

Program Bulletin #2023-03 circulated on July 14, 2023

- Procorem Users
- Procorem Workcenters
- Tenant Events
- Data Integrity
- Market Units
- Asset Management
- Multifamily Inspections & File Reviews
- Owner's Certifications
- Navigating the Workcenters



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PROGRAM BULLETIN

To: Owners and Managers of Multifamily Developments

From: Michael DiChiaro, Director of Leased Housing and Rental Services

Date: July 14, 2023

Subject: Procorem System Access and Requirements for Owners and Management Agents with Compliance and/or Financial Reporting Obligations

Bulletin #2023-03

RIHousing has partnered with ProLink Solutions in implementing a new software program, Procorem, for the purpose of communication with and monitoring of its multifamily portfolio. Owners and Managers of Multifamily Developments that received direct financing or funding administered by RIHousing, including but not limited to Low Income Housing Tax Credits, HOME, NOP, Preservation, Work Force Housing, etc. will be required to submit tenant certifications, financial reports, inspection responses, and more through Procorem.

PROCOREM USERS

All users of this platform will be required to submit a Procorem User Authorization form prior to admission into the workcenter(s) designated to each property. Due to the potential for exposure to PII and other sensitive information in Procorem, each user must be approved to gain access from a representative of the owner/agent with sufficient authority to execute documents on behalf of his or her organization. RIHousing requires at least one employee from both the ownership and management agent of each site with LIHTC, ancillary funding or RIHousing financing to register in Procorem.

Procorem users will be assigned only to the workcenter(s) deemed necessary on the Procorem User Authorization form. The available categories include but are not limited to Asset Management, Compliance, Development and Design & Construction. RIHousing reserves discretion to disallow access to certain workcenters on a need-to-know basis. One example would be a property manager requesting and being denied access to a Development workcenter.

Users will be required to certify annually; notification of the recertification event will be distributed through Procorem. Failure to respond to a user recertification shall result in the suspension of that user's access to the system. Access will be restored only upon receipt of the required recertification document.

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MEMO

To: Developers and Development Team Members of Multifamily Developments

From: Anne Berman, Director of Real Estate Development

Date: January 4, 2024

Subject: Procorem System Access and Requirements for Owners and their Development Team for Underwriting and Project Construction

Program Bulletin #2024-01

RIHousing has partnered with ProLink Solutions in implementing a new software program, Procorem, which has become the platform for underwriting all multifamily development transactions as of January 1, 2024. Owners and Developers of Multifamily Developments that received direct financing or funding administered by RIHousing, including but not limited to new construction, preservation, affordable or middle income will be required to submit all development, construction and property management related due diligence through Procorem from preliminary commitment through construction completion.

A separate Program Bulletin (2023-02) was released by the Leased Housing Division for owners and management agents with respect to compliance and financial reporting obligations.

PROCOREM USERS

All users of this platform will be required to submit a Procorem User Authorization form prior to admission into the workcenter(s) designated to each property. Due to the potential for exposure to Personal Identifiable Information (PII) and other sensitive information in Procorem, each user must be approved to gain access from a representative of the owner/agent with sufficient authority to execute documents on behalf of his or her organization. RIHousing requires at least one employee from both the ownership and management agent of each site with LIHTC, ancillary funding or RIHousing financing to register in Procorem.

Procorem users will be assigned only to the workcenter(s) deemed necessary on the Procorem User Authorization form. For purposes of this Program Bulletin, the available categories include but are not limited to Development and Design & Construction and Property Management. RIHousing reserves the discretion to disallow access to certain workcenters on a need-to-know basis. One example would be a civil engineer requesting and being denied access to an underwriting workcenter.

Users will be required to certify annually; notification of the recertification event will be distributed through Procorem. Failure to respond to a user recertification shall result in the suspension of that

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Program Bulletin #2024-01 circulated on January 4, 2024

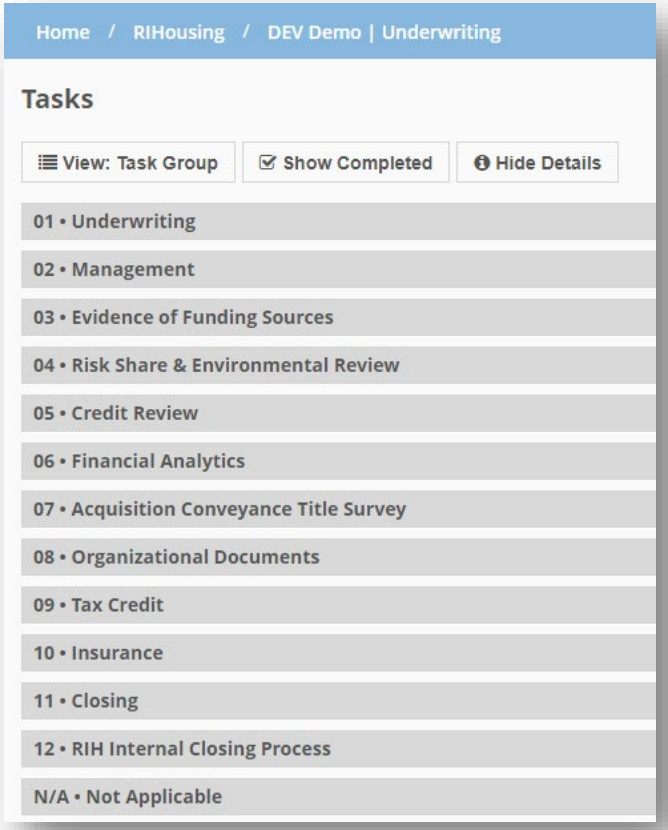
- Procorem Users
- Procorem Workcenters
- Navigating the Workcenters

Procorem Users

- All users are required to submit a Procorem User Authorization form
- At least one employee from ownership entity
  - RIHousing encourages as many users as would have had access to the former Smartsheets
- Workcenters are created for deals in the RIHousing Development pipeline
  - The submission of an application in OneStop App does not guarantee a workcenter invite
- Users will be recertified annually

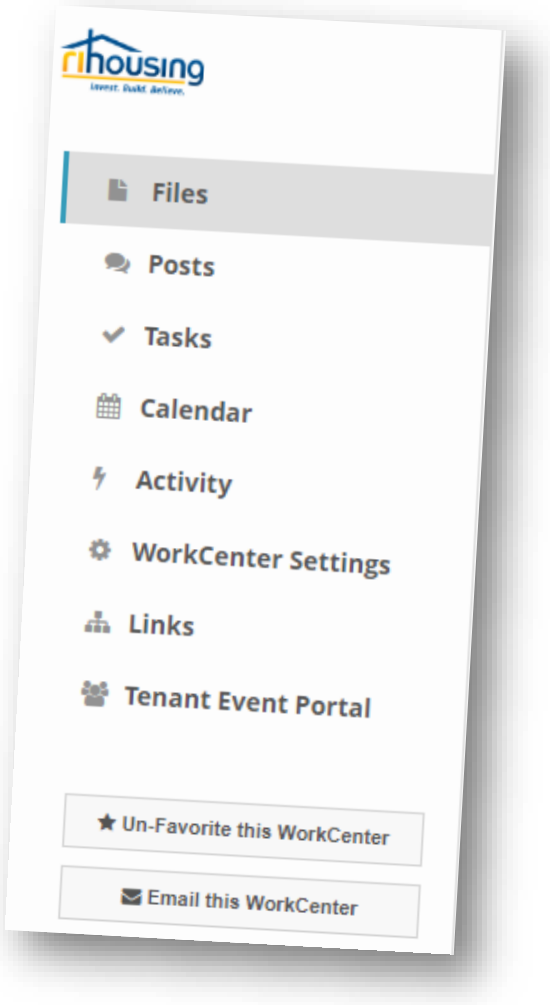
Why Procorem?

- Procorem workcenters replace Smartsheets previously used to collect due diligence and assist with project management
  - Underwriting
  - Design & Construction
- Workcenters mirror former Smartsheets and will be aligned with the specifics of each transaction
  - Eliminate items not relevant to the deal



Workcenters

- User-friendly
- Deal-specific
- System-generated reminders
- Transparency
- Tenant Event Portal is not applicable to this function



Workcenter Roles • RIHousing

Roles are assigned to workcenter users. This allows the Tasks to send reminders to the appropriate parties. RIHousing roles typically approve tasks.

Role	Underwriting	Design & Construction
RIHousing Development Officer	✓	✓
RIHousing D&C Specialist		✓
RIHousing Assistant Director	✓	✓
RIHousing D&C Manager		✓
RIHousing Tax Credit Administrator	✓	✓

Workcenter Roles • Partners

Roles are assigned to workcenter users. This allows the Tasks to send reminders to the appropriate parties. Partner roles typically complete tasks.

Role	Underwriting	Design & Construction
Borrower	✓	✓
Architect		✓
Contractor		✓

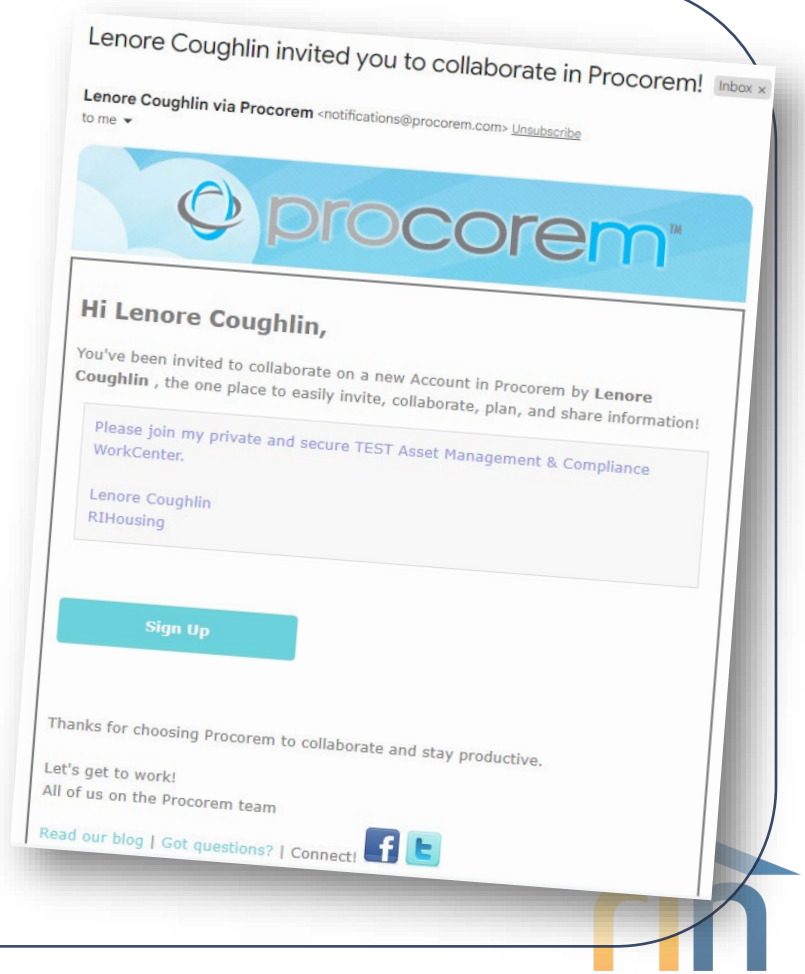
RIHousing may add and amend workcenter roles to better suit the process as more of our partners are invited into Procorem.

Workcenter Invitations

When a RIHousing employee invites an external user to a workcenter, a notification is sent to that user's e-mail address.

This example focuses on a first-time user's perspective of the signup procedure.

- Click **Sign Up**



Sign Up

The Sign Up button opens the link in an internet browser; another verification e-mail will be sent after you finish signing up.

- Enter your **First Name**
- Enter your **Last Name**
- Create a secure **Password** using the criteria in the window
  - No spaces
  - At least 1 number
  - At least 1 capital letter
  - At least 1 lowercase letter
  - At least 8 characters long

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Check your E-mail

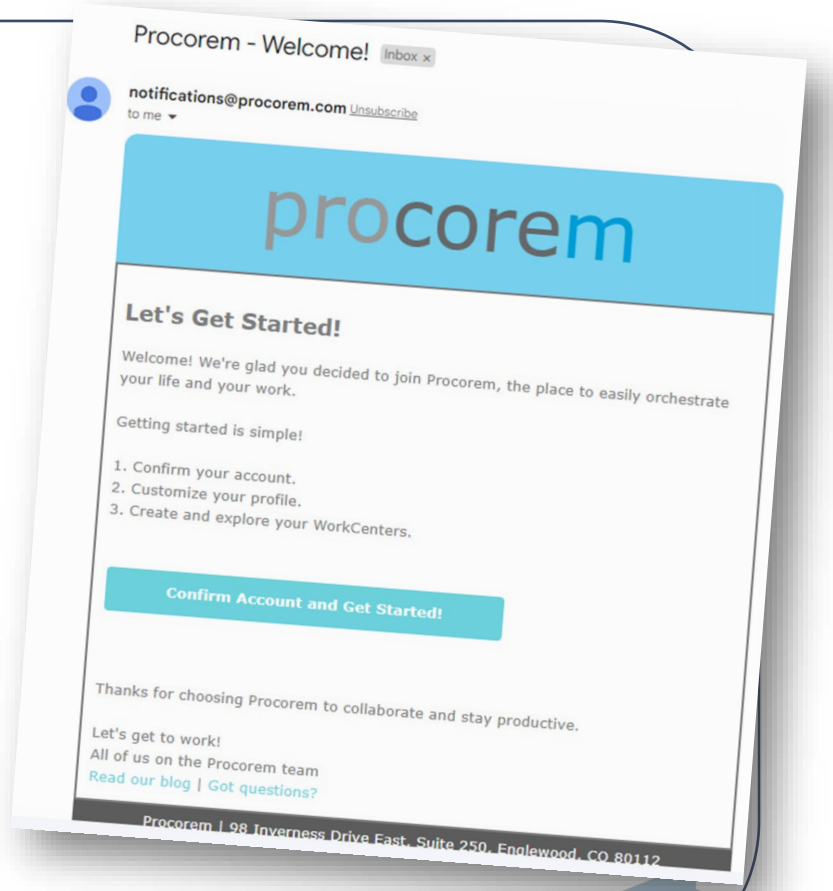
You're almost done! When you see this screen that's your queue to check your e-mail for the final step.

Check your e-mail

Confirm your Account

All that's left to do is confirm your account before you sign into Procorem.

- Click **Confirm Account and Get Started!**

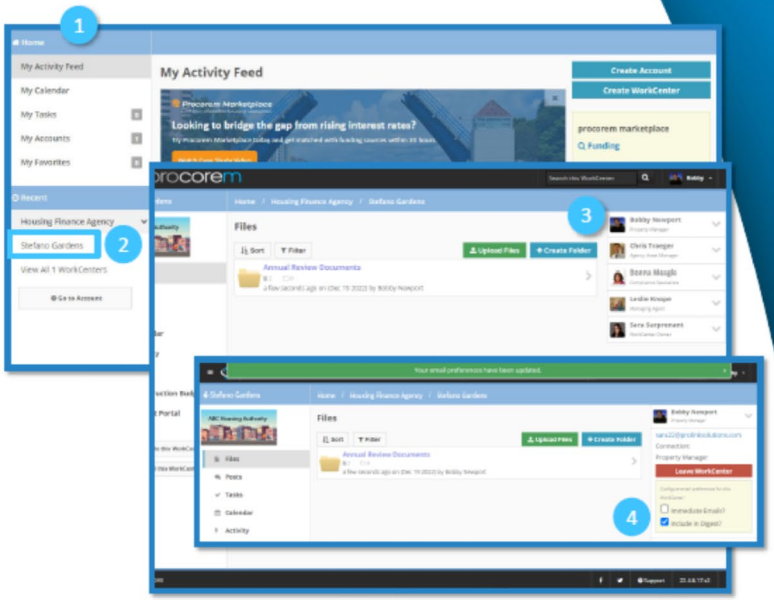


Didn’t Get Your Invite?

- Check your junk mail
- Contact your IT Department to whitelist notifications@procorem.com
- Contact Procorem System Admin to confirm your e-mail address

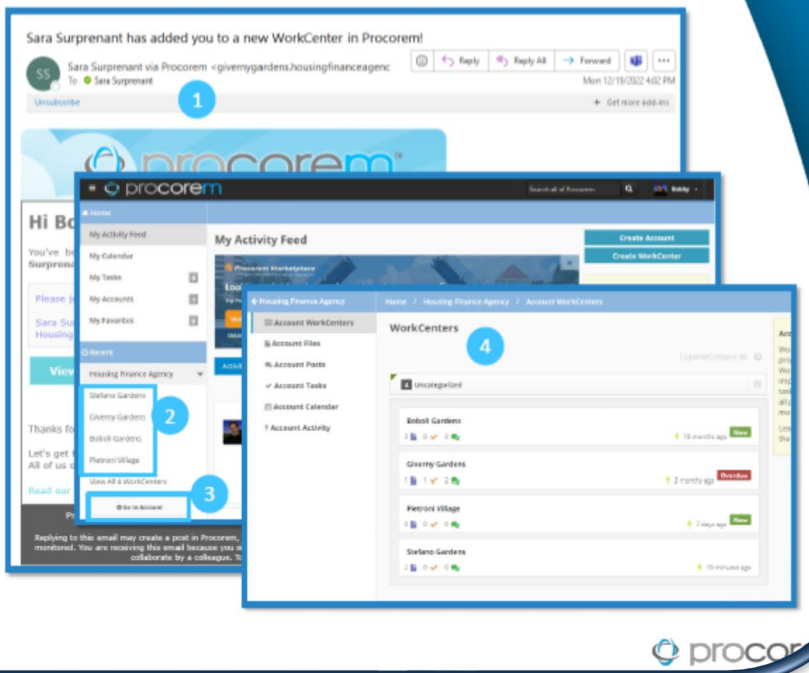
Invitation to Procorem

1. After clicking **Sign Up Now**, you'll be taken to the **Procorem Home** page.
2. On the left, you'll see the name of the **Agency** and the **WorkCenter** representing your property. Click on the name of the **WorkCenter** to access the **WorkCenter**.
3. Note other collaborators on the **WorkCenter**, including **Agency** contacts.
4. **Procorem** emails notifications in real time for file, post, and **WorkCenter** activities – if you'd like to receive one daily digest email instead of immediate emails, click the down arrow next to your name and deselect **Immediate Emails**.



Invitation to Procorem

1. Once you've created your account, you'll receive an email invitation for each WorkCenter you've been added to.
2. When you log in to Procorem, you'll see your WorkCenter(s) in the left nav panel.
3. To view all your WorkCenters, click on Go To Account.
4. If you don't have access to a needed WorkCenter, contact the **Agency** directly to request access.



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- Files
- Posts
- Tasks
- Calendar
- Activity
- Links
- Tenant Event Portal

Files

Each deal will have file structures unique to their funding layers and construction requirements. When submitting a document for a task, the corresponding file should be stored in the folder with the label of the Task Group for that task.

- Files
- Posts
- Tasks
- Calendar
- Activity
- Links
- Tenant Event Portal

Posts

Communicate with your Development Officer and Design & Construction Specialists directly through Procorem using the Posts feature.

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Files

Posts

Tasks

Calendar

Activity

Links

Tenant Event Portal

Tasks

A Procorem workcenter may be built to remind users of upcoming deadlines and reminders of past due deadlines with built-in tasks.

When submitting a document for a task, the file path where the item should be stored will be named to match the Task Group.

You can mark tasks as completed; RIHousing staff may approve tasks.

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Files

Posts

Tasks

Calendar

Activity

Links

Tenant Event Portal

Calendar

Tasks with dates assigned to them will be reflected on the calendar in a workcenter.

The beginning date of the task, end date of the task, and all dates in between will be highlighted.

- Files
- Posts
- Tasks
- Calendar
- **Activity**
- Links
- Tenant Event Portal

Activity

Shows you what you may have missed. Entries are logged for each task completed, file uploaded, file downloaded, etc.

Your e-mail notifications should look similar to what you see in the Activity section of Procorem.

- Files
- Posts
- Tasks
- Calendar
- Activity
- **Links**
- Tenant Event Portal

Links

Not applicable to all workcenters. If there is only one workcenter for a deal, it will not have any links.

Remember, some sites have both an Underwriting workcenter and a Design & Construction workcenter; those will be linked.

Permission settings and the completed Procorem User Authorization form will determine whether you have access to any linked workcenters.

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Files

Posts

Tasks

Calendar

Activity

Links

Tenant Event Portal

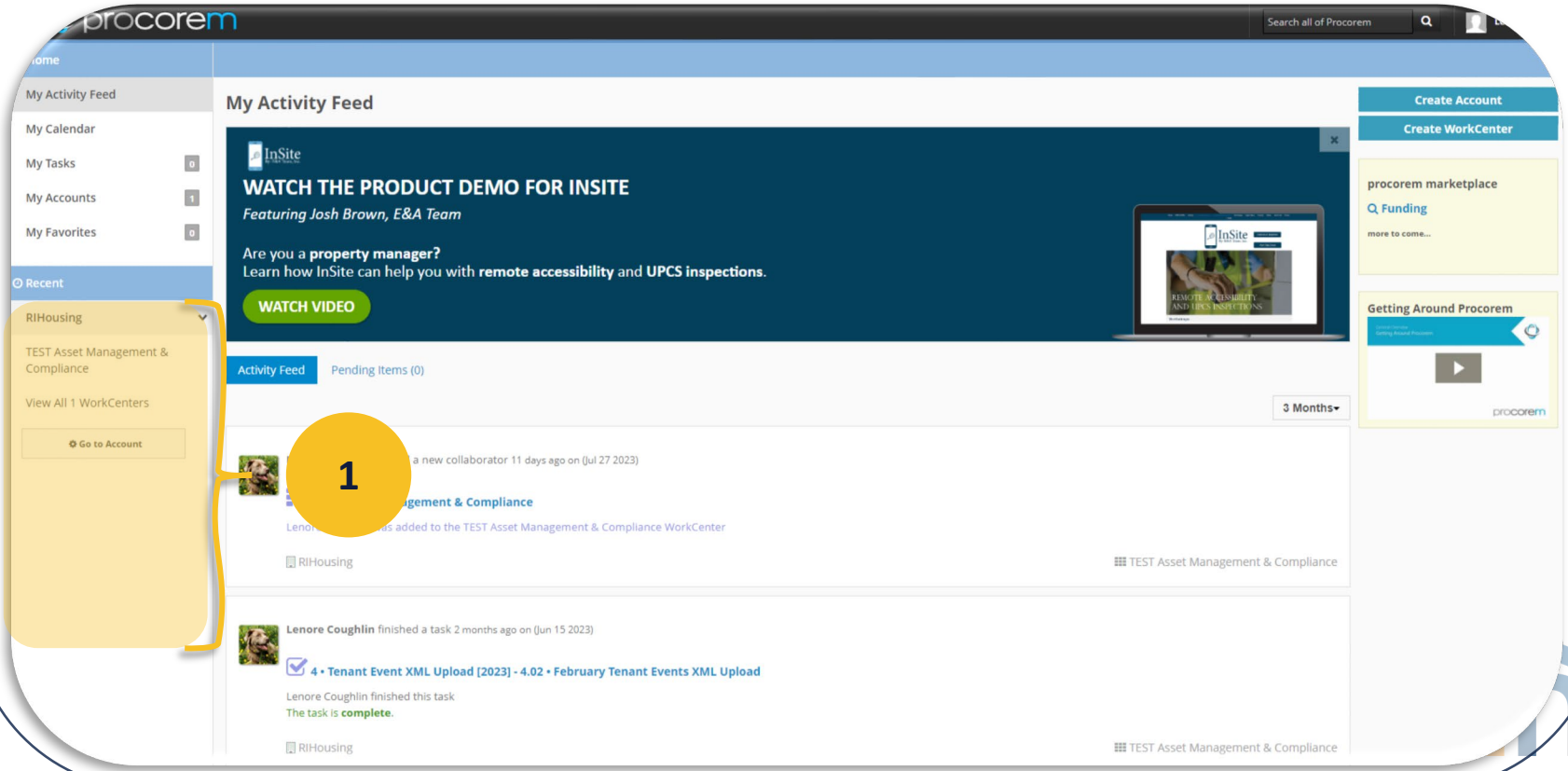
Tenant Event Portal

Available only in Compliance workcenters, this portal is where tenant events must be uploaded by the 10th of each month.

ProLink will be sponsoring their annual Tenant Portal training on January 25th.

Accessing the Workcenter

1 Log into Procorem and select the desired workcenter.



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Files

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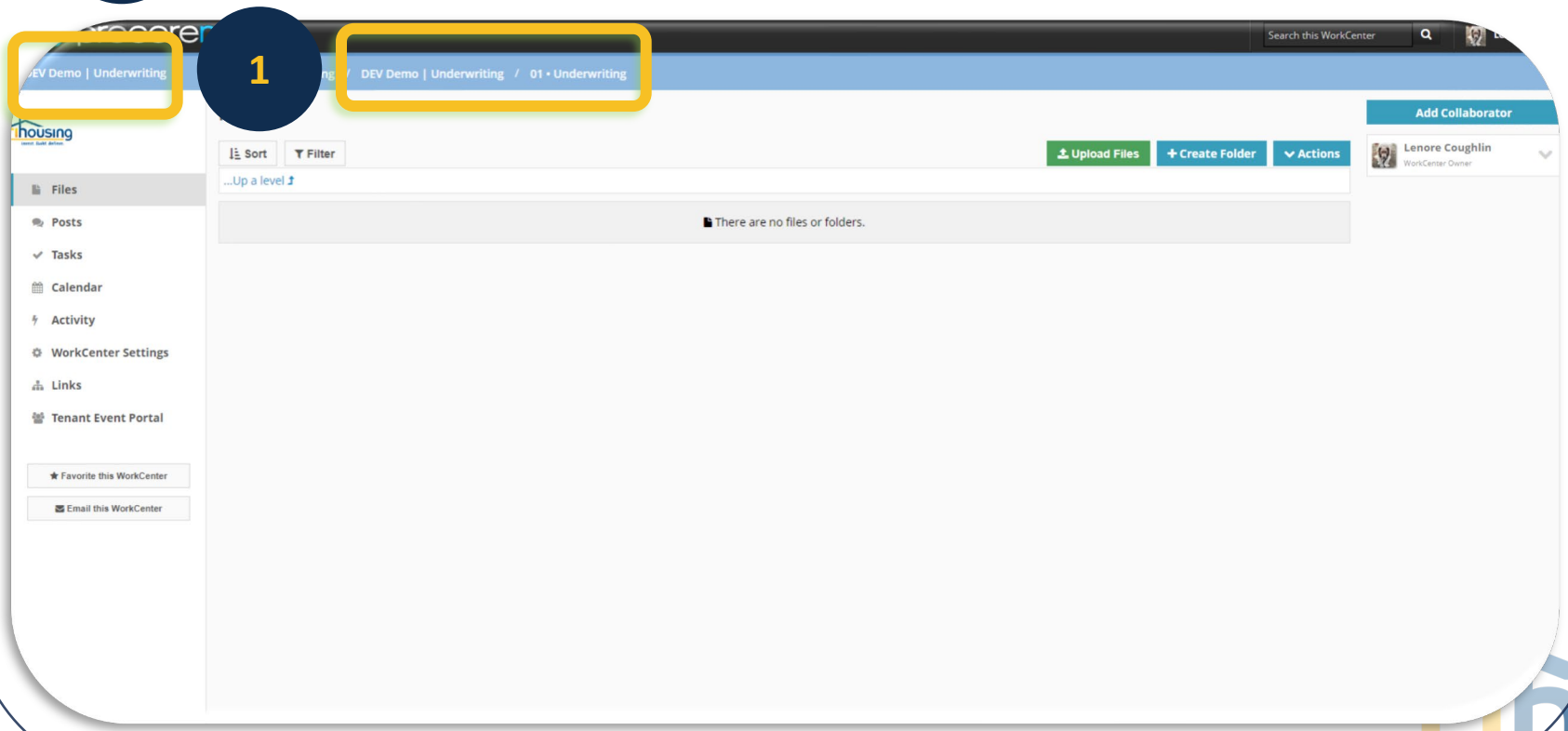
Files	Upload any file type instantly. Easily upload multiple documents at the same time up to 2 GB at once.
Commenting	Collaborate on files right within Procorem by commenting on the file record. All comments are integrated with your email to ensure your team stays on task.
Versioning	All versions of files are stored and recorded in Procorem. If you would like to restore or delete an old version of a file, users with the right access can do it with the push of a button.
File Activity	All file activities such as downloading, uploading, commenting, deleting, moving, copying and more are fully recorded in Procorem so you have a complete audit history of all activity.

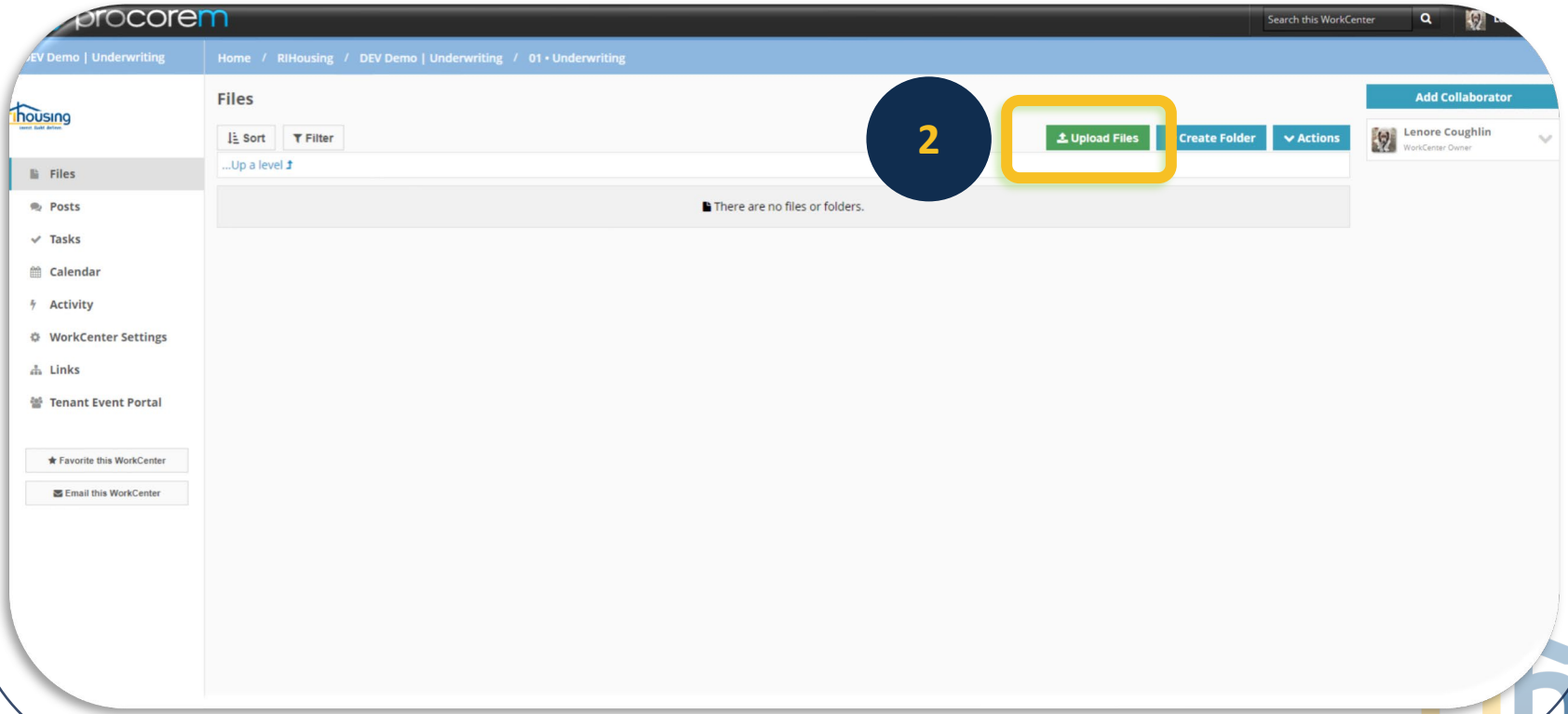
Uploading Files

1 Navigate to the workcenter where you would like to upload file(s).



Uploading Files

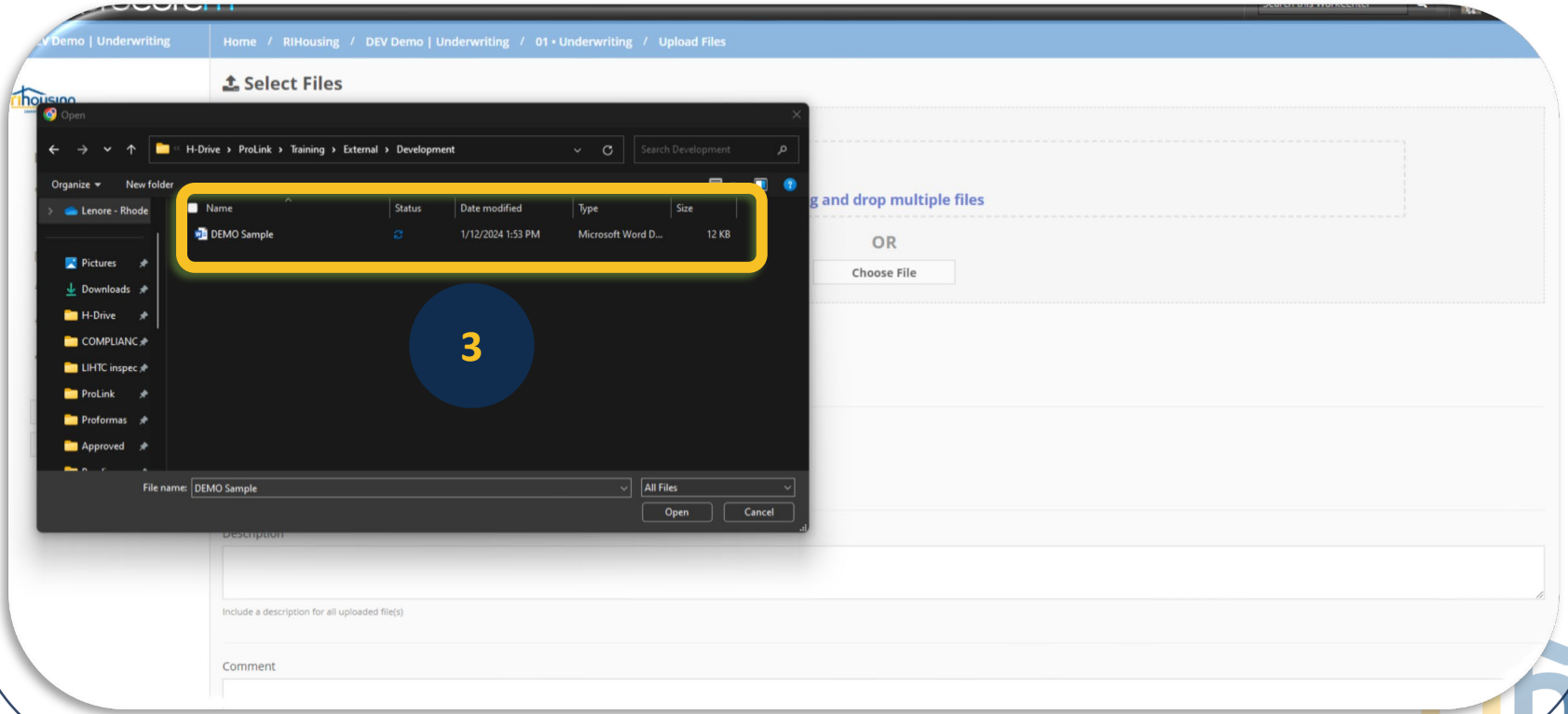
2 Select **Upload Files**



Uploading Files

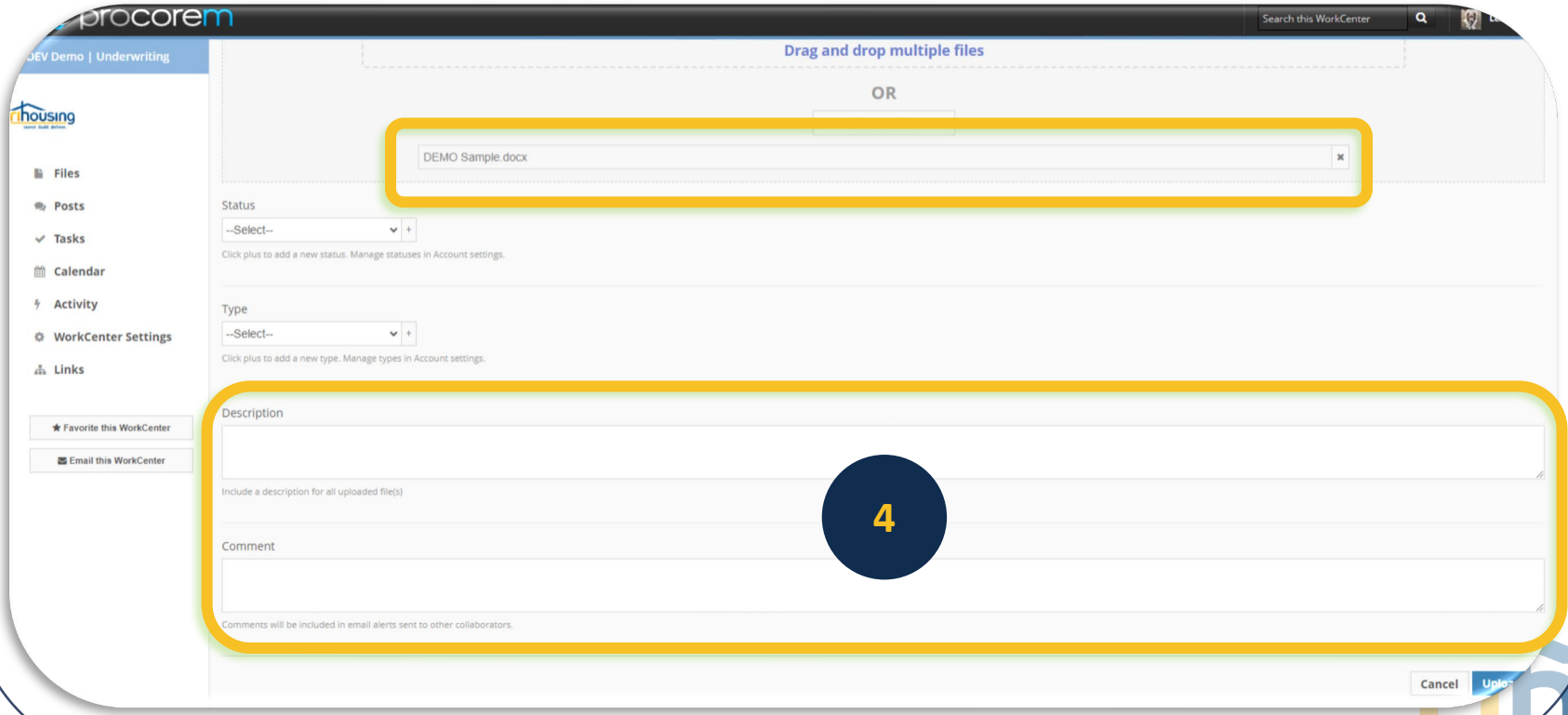
3

Drag and Drop or click **Choose File**. Both options will require you to select the files to be uploaded from your computer.



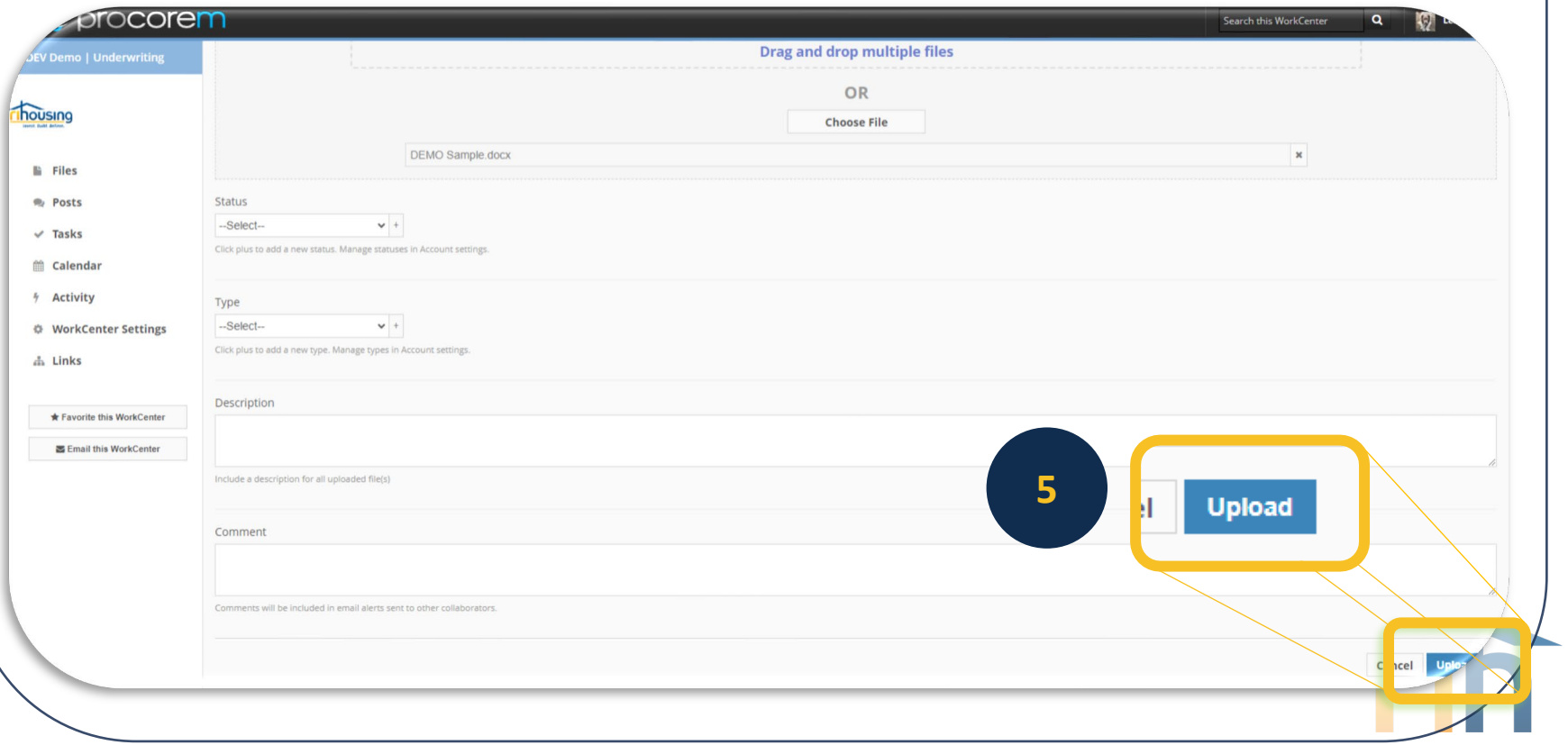
Uploading Files

4 After your selection has been added to the list of files, you have the option to enter a Description and/or Comment.



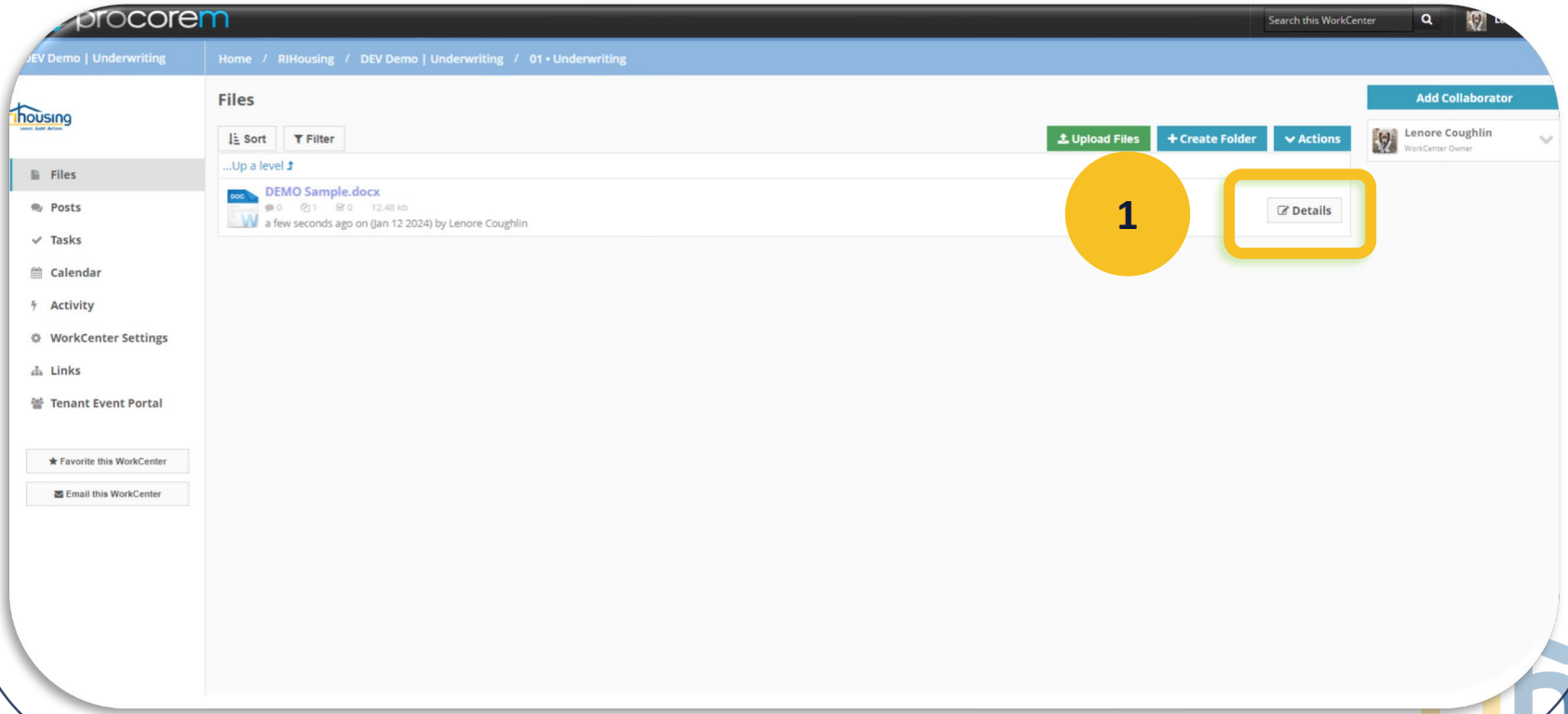
Uploading Files

5 Click **Upload** to complete the process.



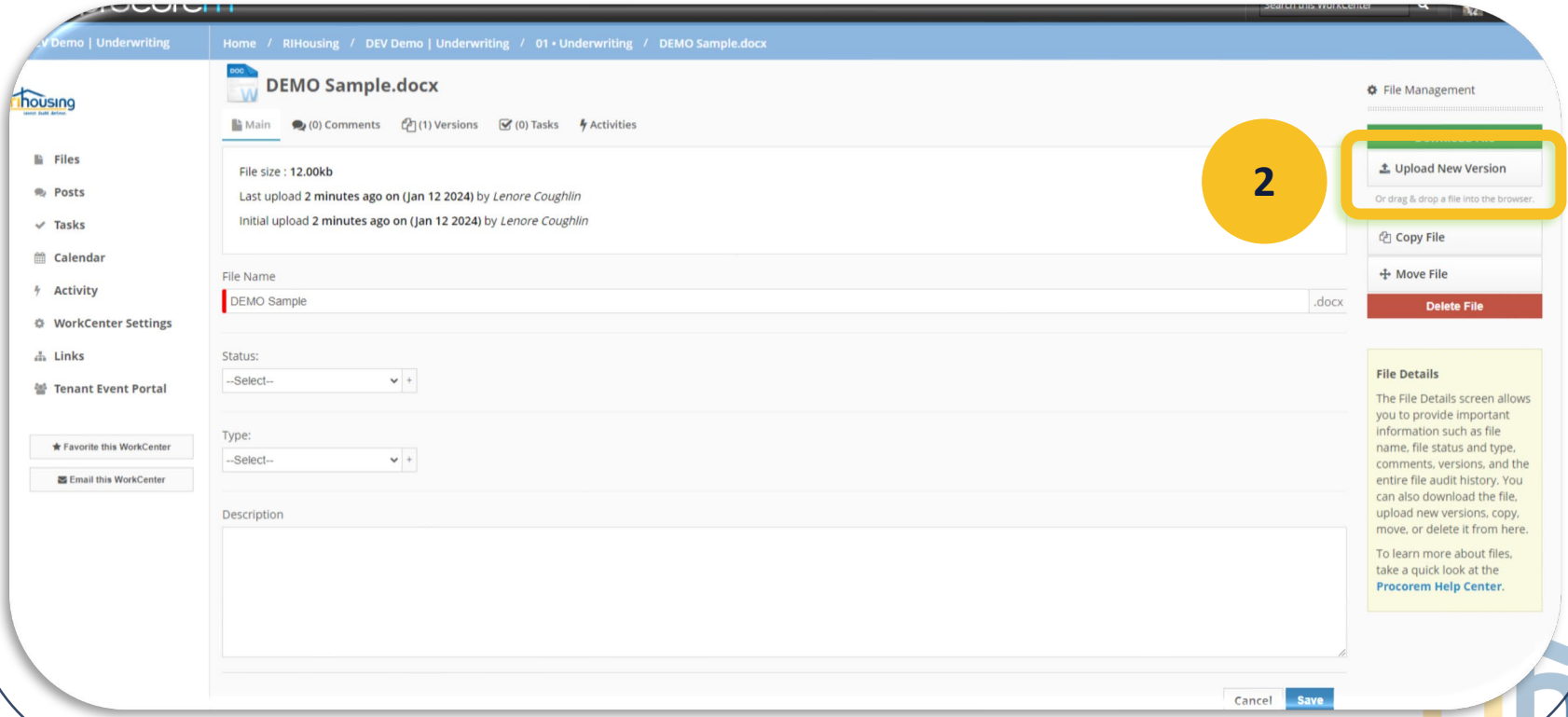
Upload New Versions of Files

1 Find the original file in the workcenter. Click on **Details**.



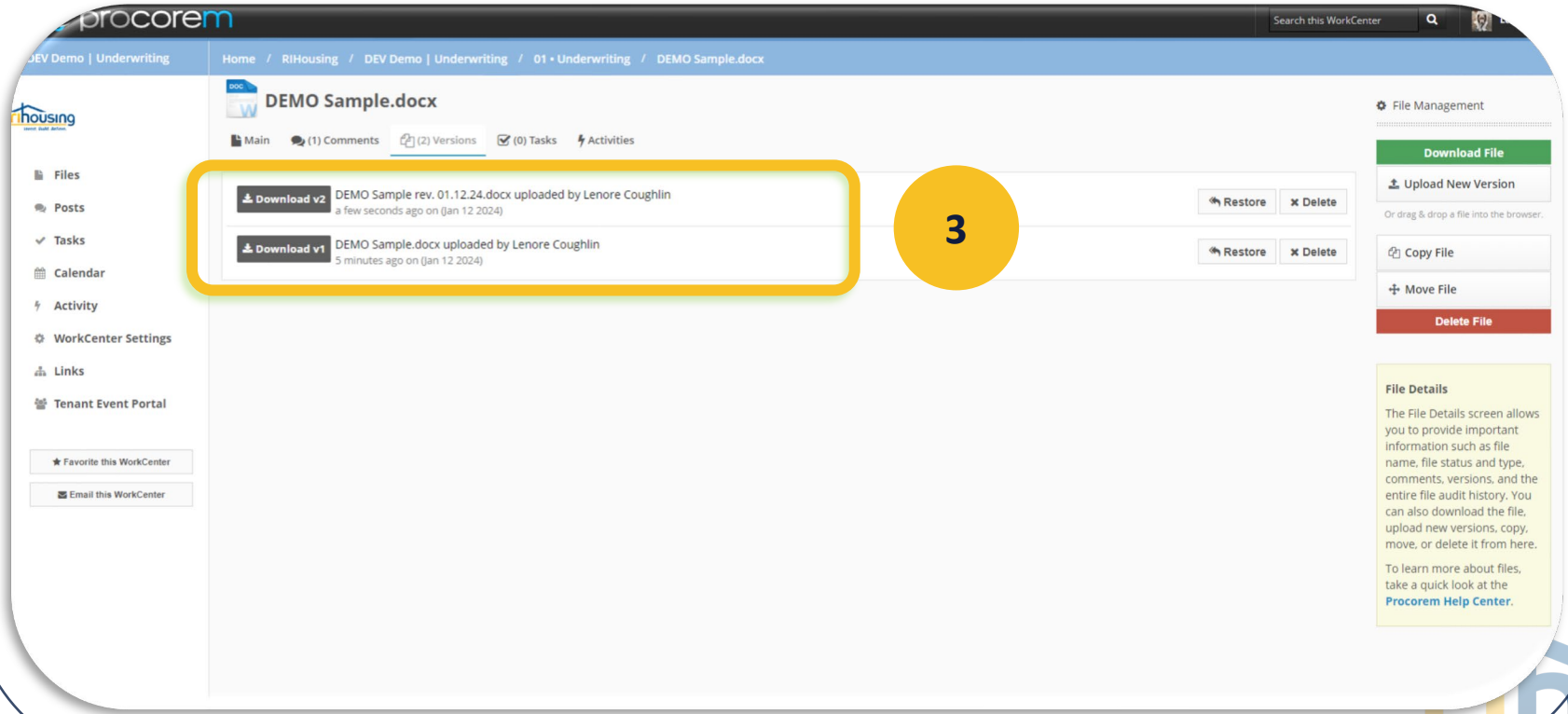
Upload New Versions of Files

2 Select **Upload New Version.**



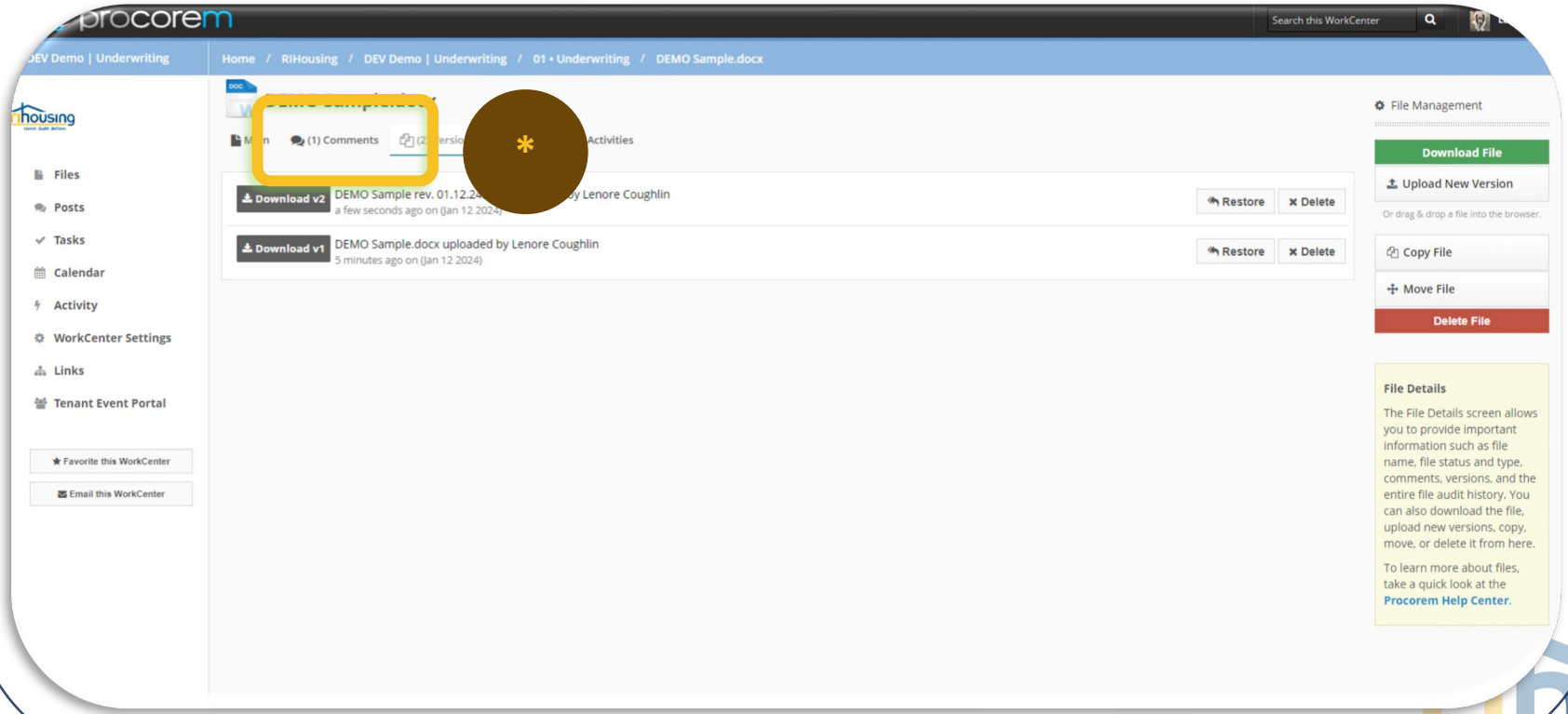
Upload New Versions of Files

3 Select the new version of the file from your computer.



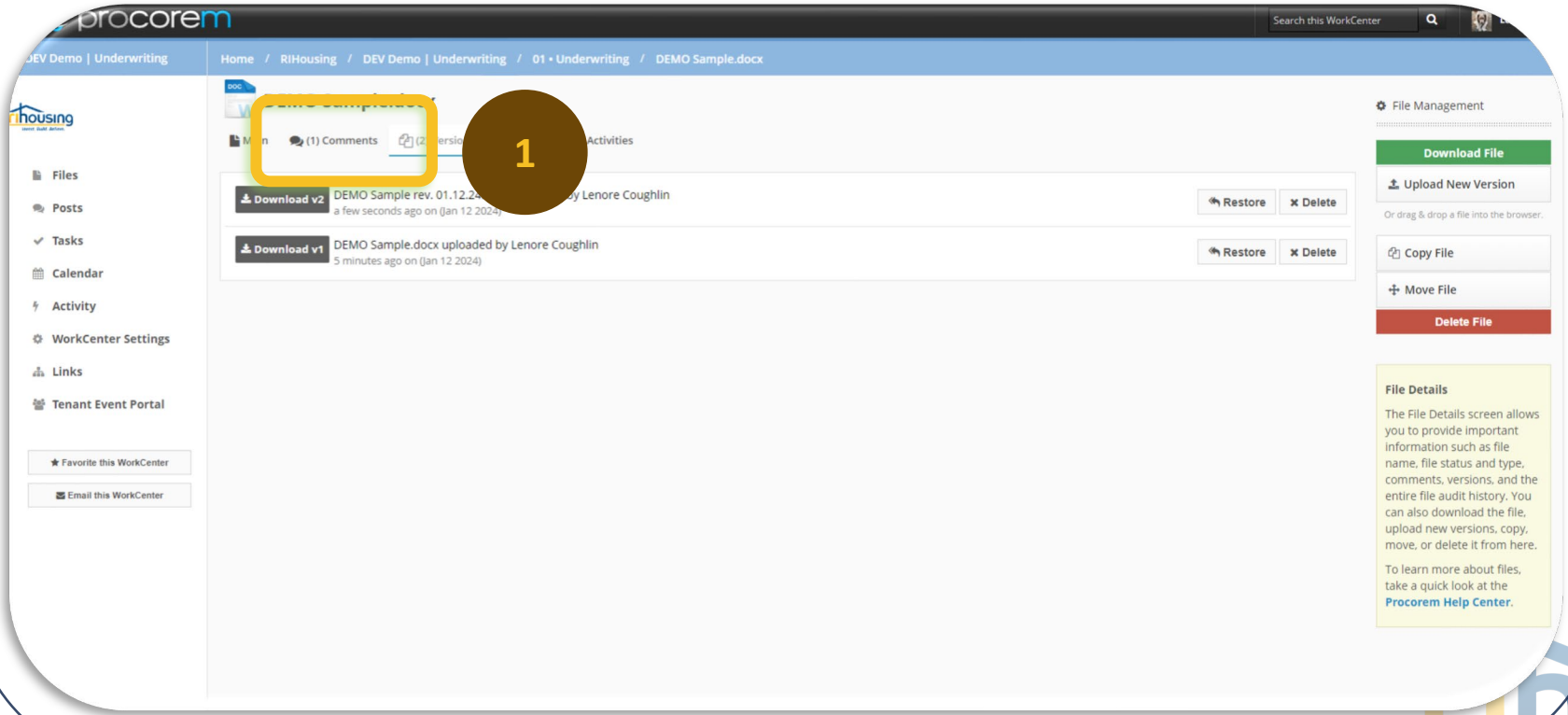
File Comments

* When a file version is added, Procorem creates a Comment to identify the user who uploaded it.



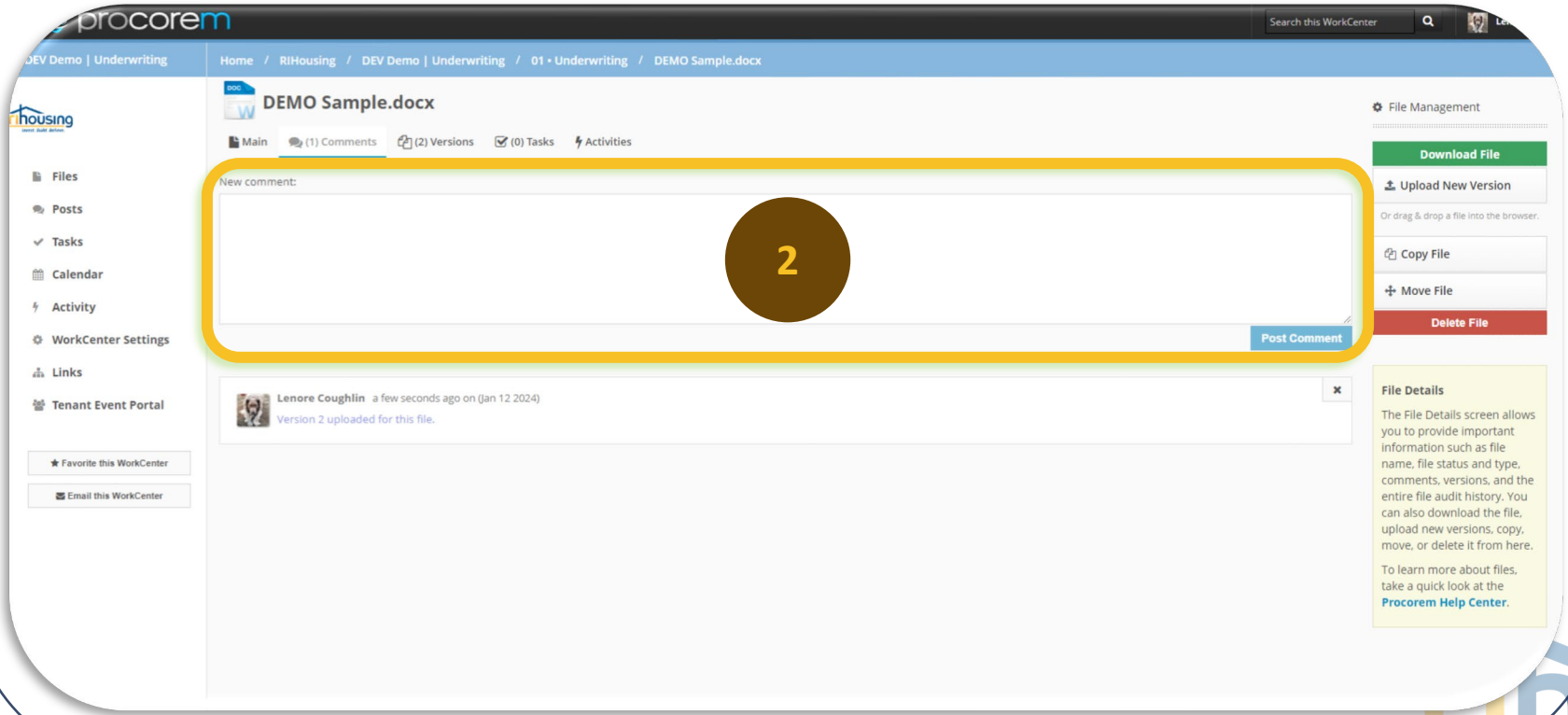
File Comments

1 To add your own comment on a file within a workcenter, select the file and click on the **Comments** tab.



File Comments

2 Enter your comment and click **Post Comment** to add it to the file.



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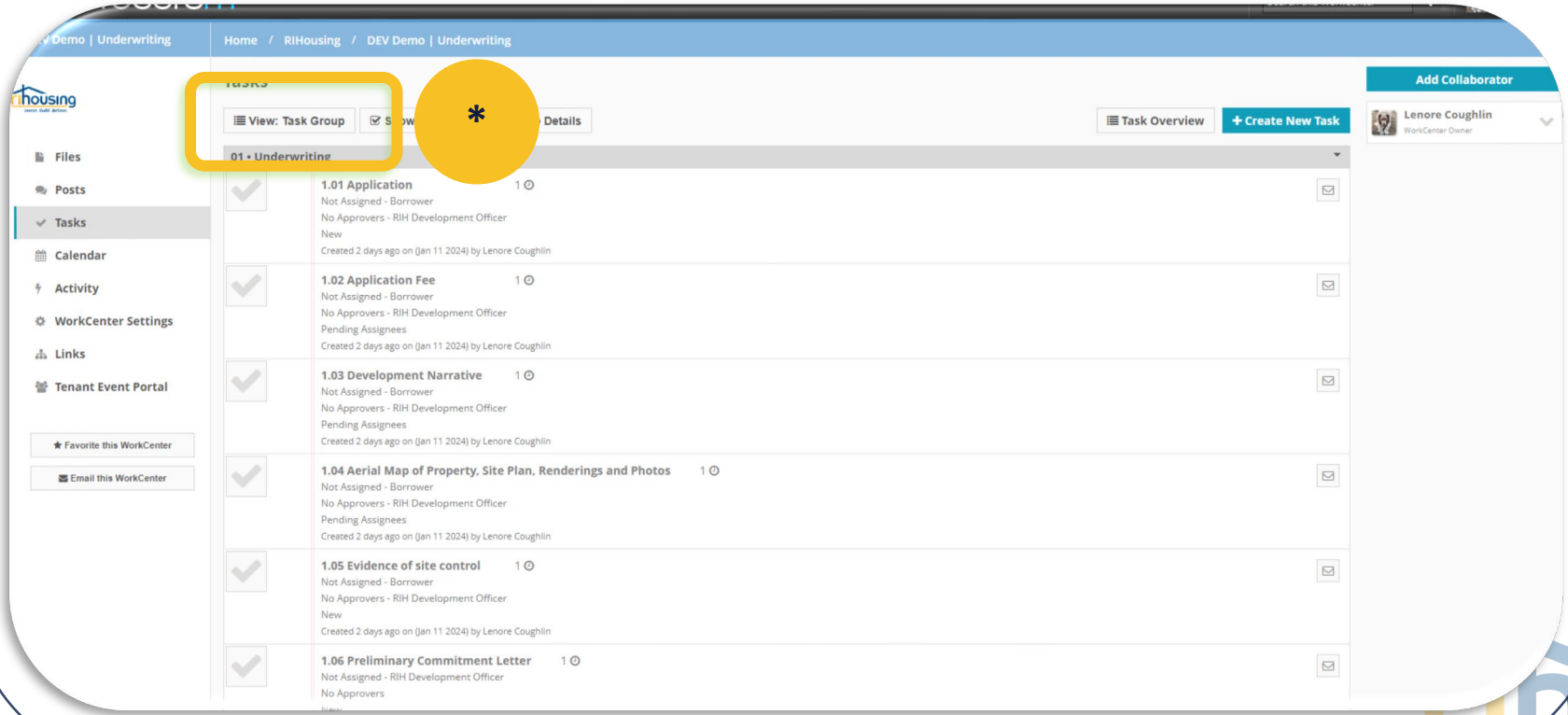
Tasks

Task Filtering	Easily sort your tasks by custom group, task status, who the task is assigned to, and when the task is due.
Assignees	Tasks are assigned to a single user or multiple users.
Approvals	Task completion requires the approval of RIHousing. Task approval may be revoked and the task re-opened at the discretion of RIHousing if a task is found to be incomplete.
Followers	Those on the project that are not assignees or approvers may be identified as Followers to stay informed through email notifications as the task status progresses.

Task Notifications	All tasks are fully integrated with email notifications. This ensures your team is kept up to speed as tasks are completed or as they fall behind.
Task Management	Tasks can be managed on a project-by-project basis or easily viewed across all projects in a single screen.
Task Statuses	Tasks progress through a variety of statuses depending on the information you have put in the task.
My Tasks	Every user can see which tasks are associated to them across all the projects in a single view.

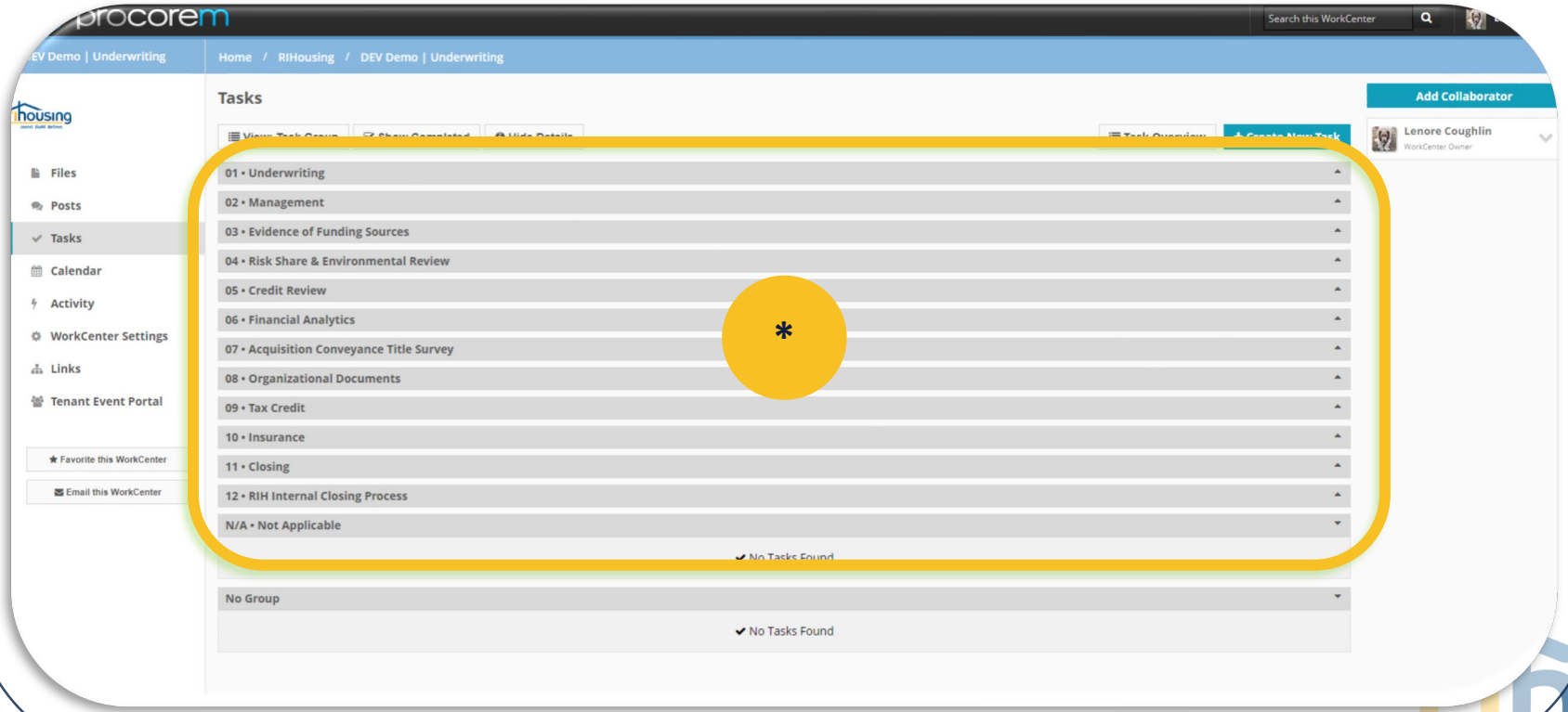
Task Grouping

* The default grouping is by Task Group, or the heading in the grey table headings. These group labels match the folder labels in Files.



Task Grouping

* Tasks Groups are collapsible. Click on a heading to collapse the tasks beneath.



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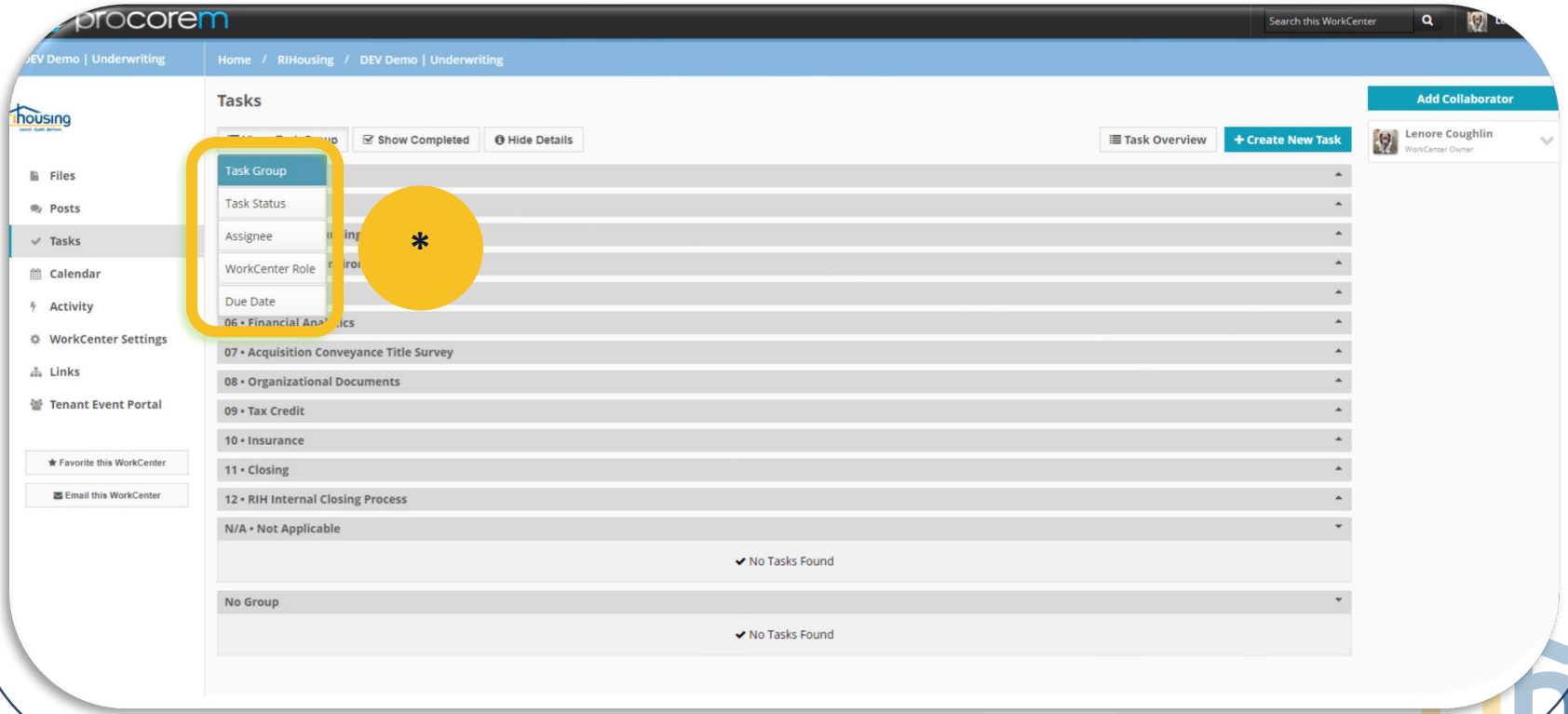
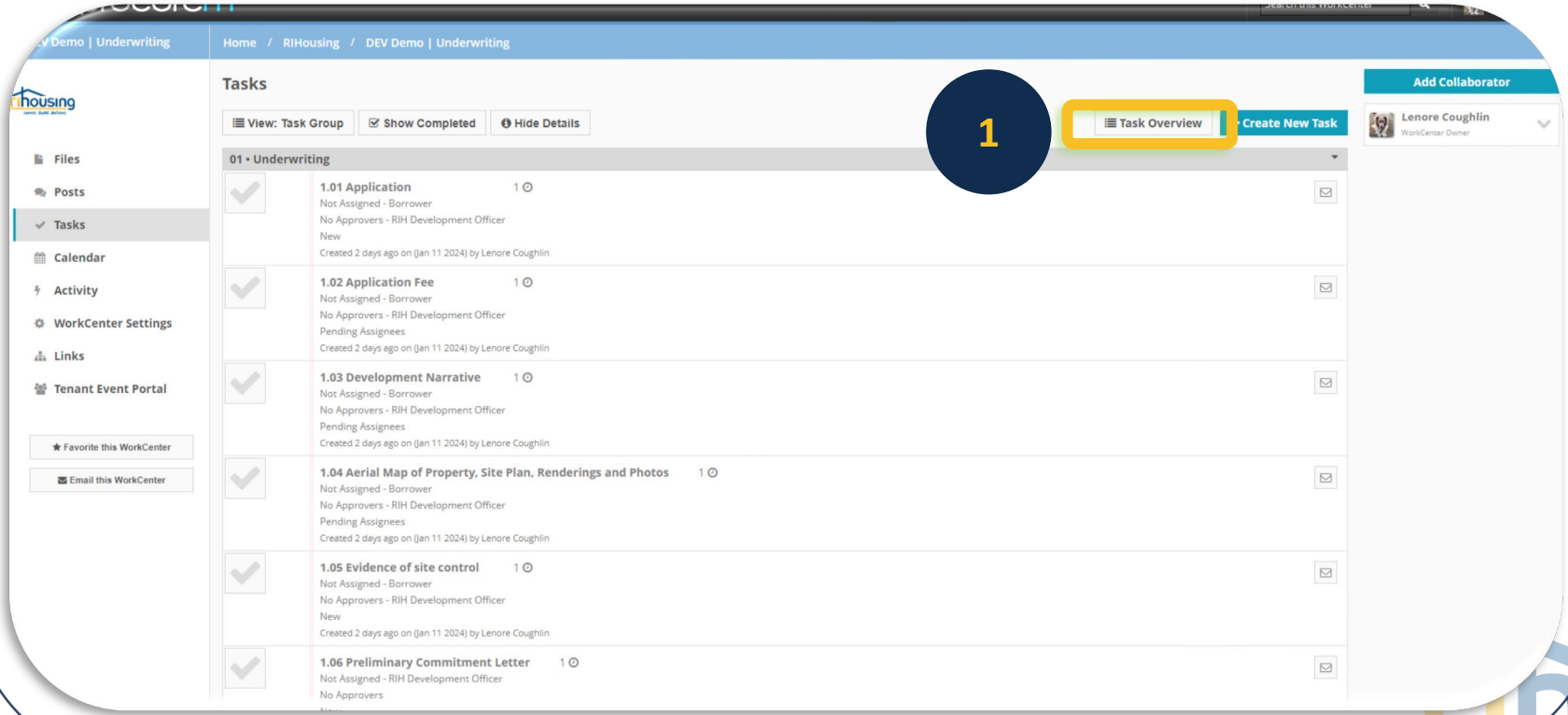


Task Filtering

1

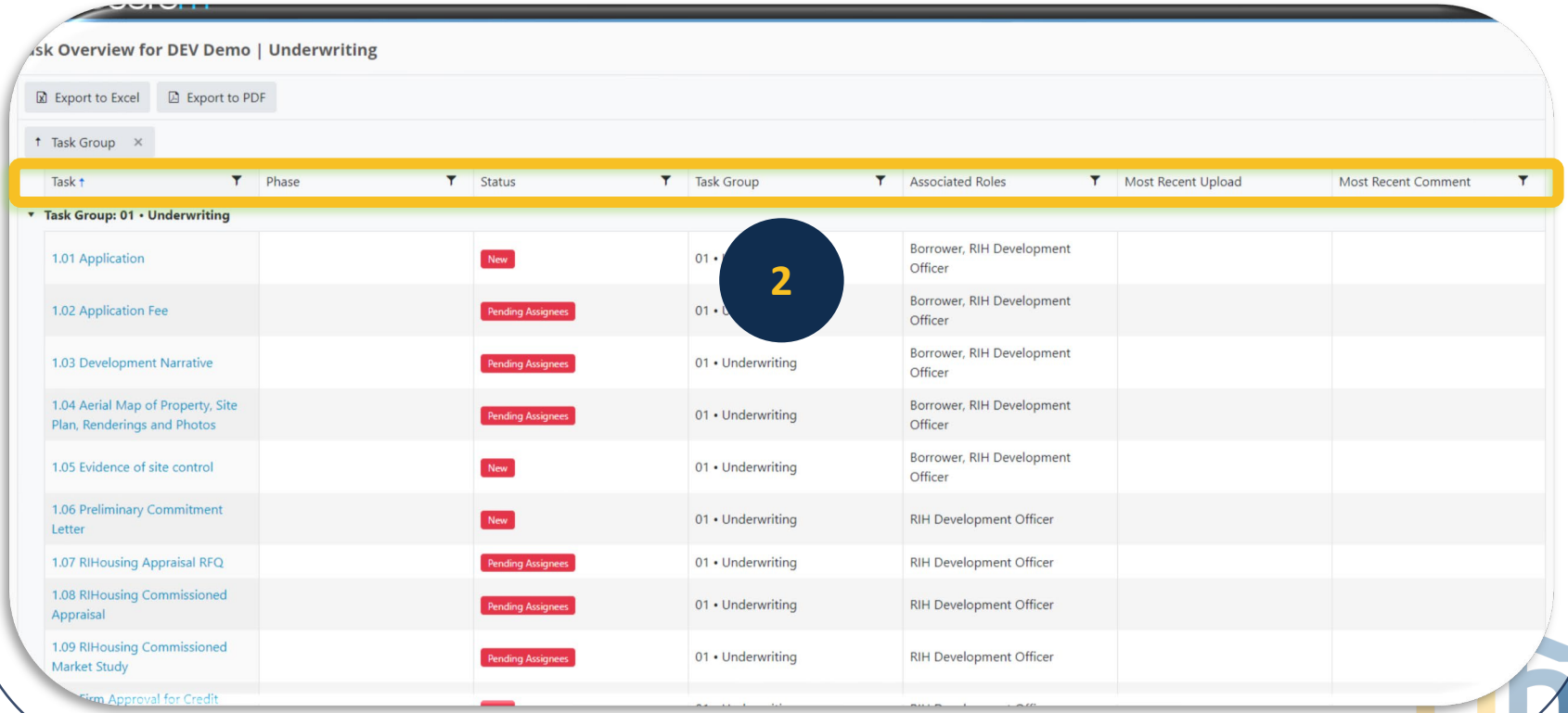
Select **Task Overview** from atop the Task Groups. A report will open in a new browser window where tasks will be grouped to reflect the **View.**



Task Filtering

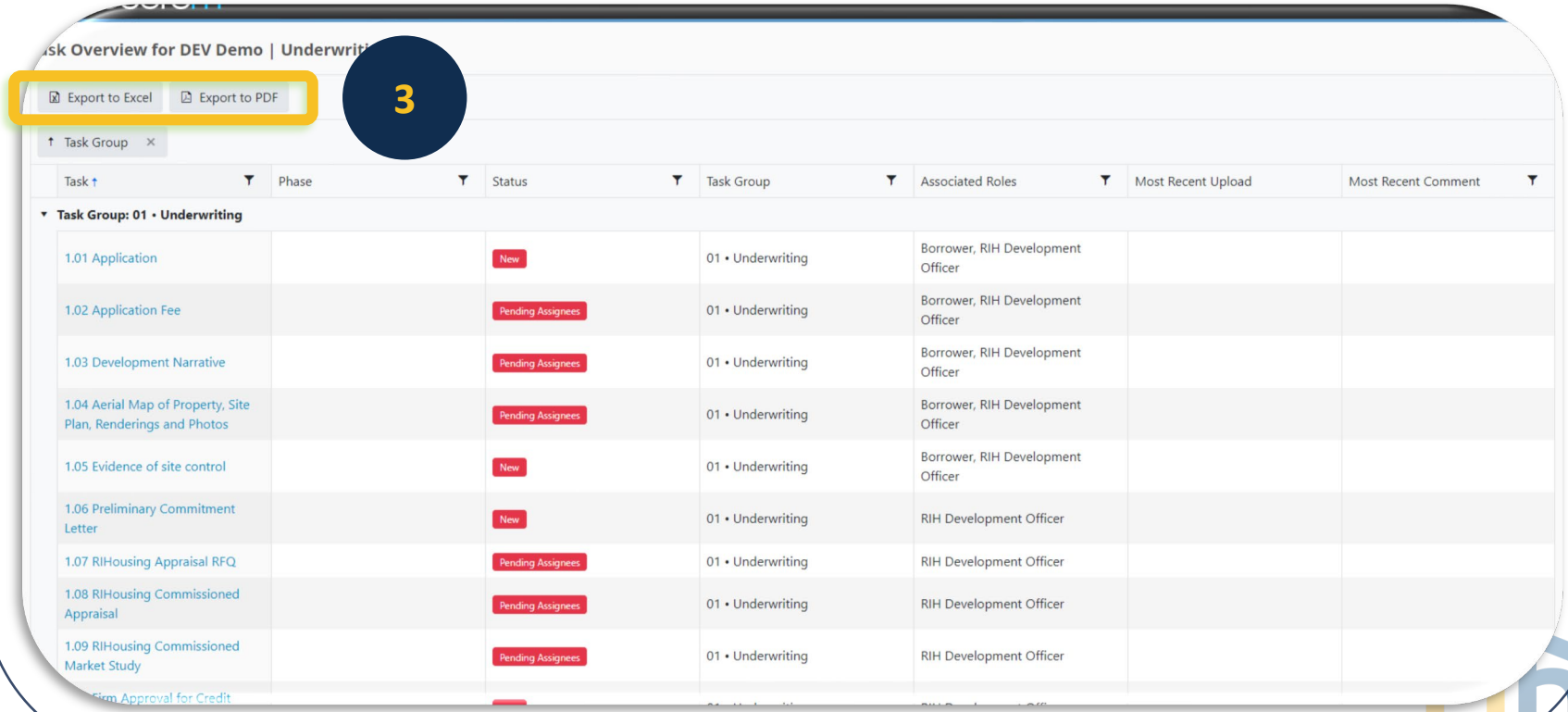
2

Use the filters available to work with the tasks in the webpage. Export to Excel (preferred) or PDF if desired.



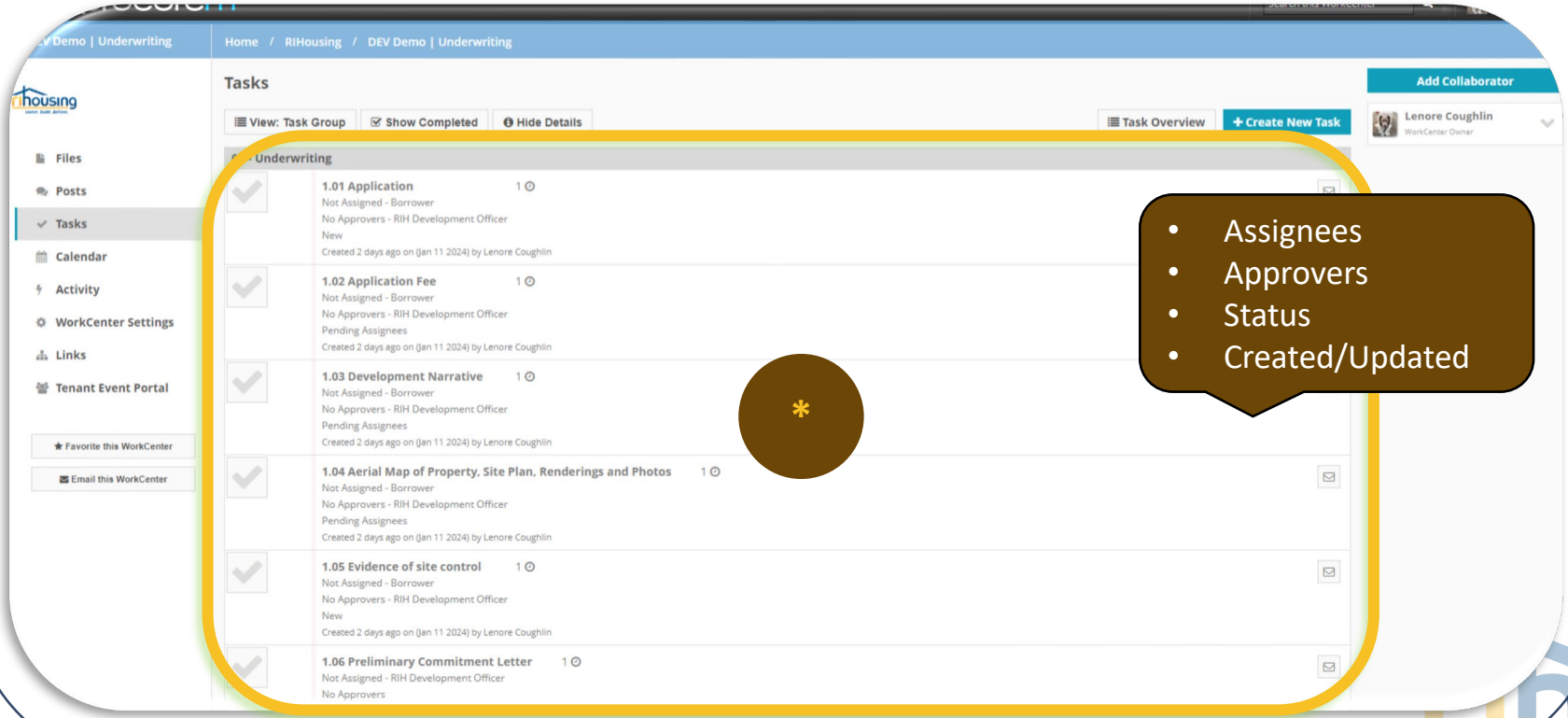
Task Filtering

3 Export to Excel (preferred) or PDF if desired.



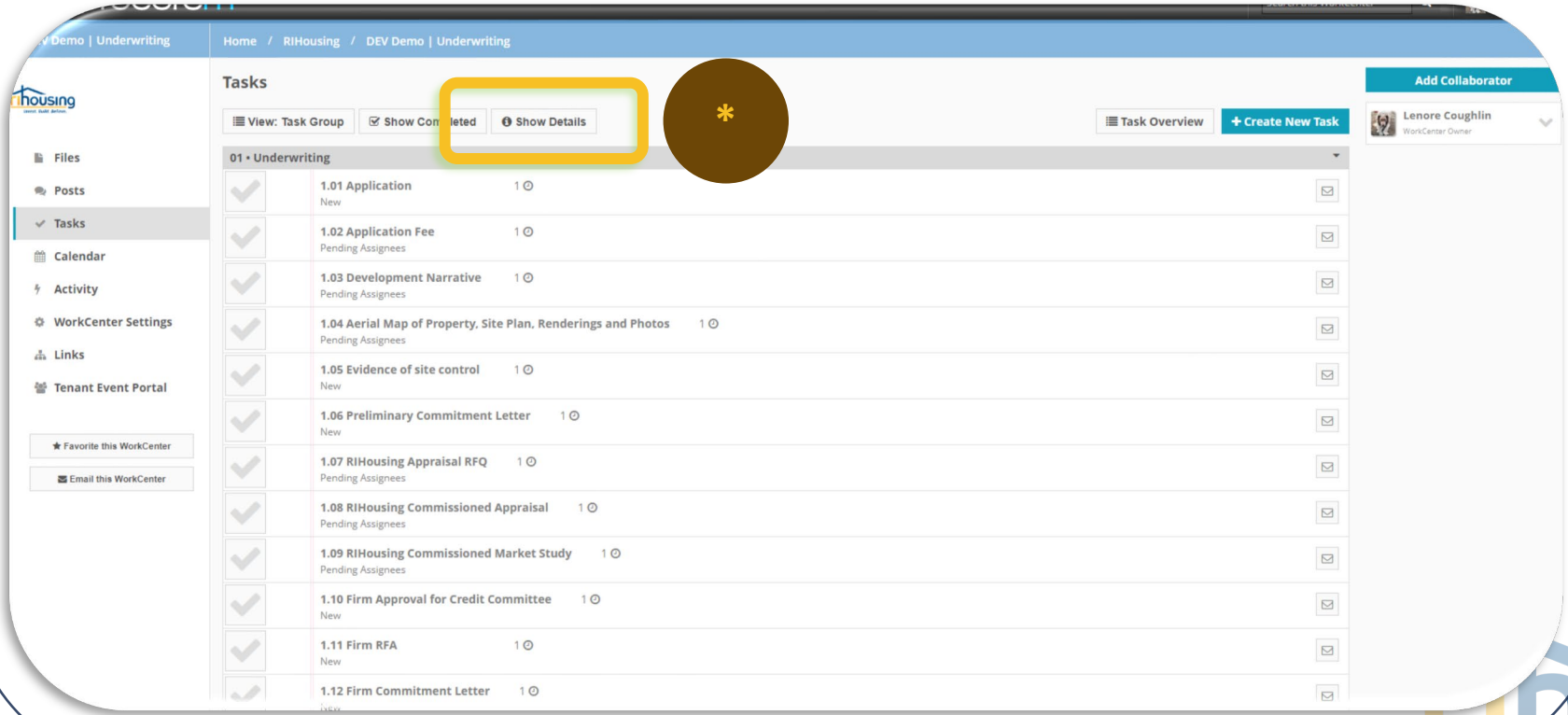
Task Details

* Some task details can be seen on the Tasks page.



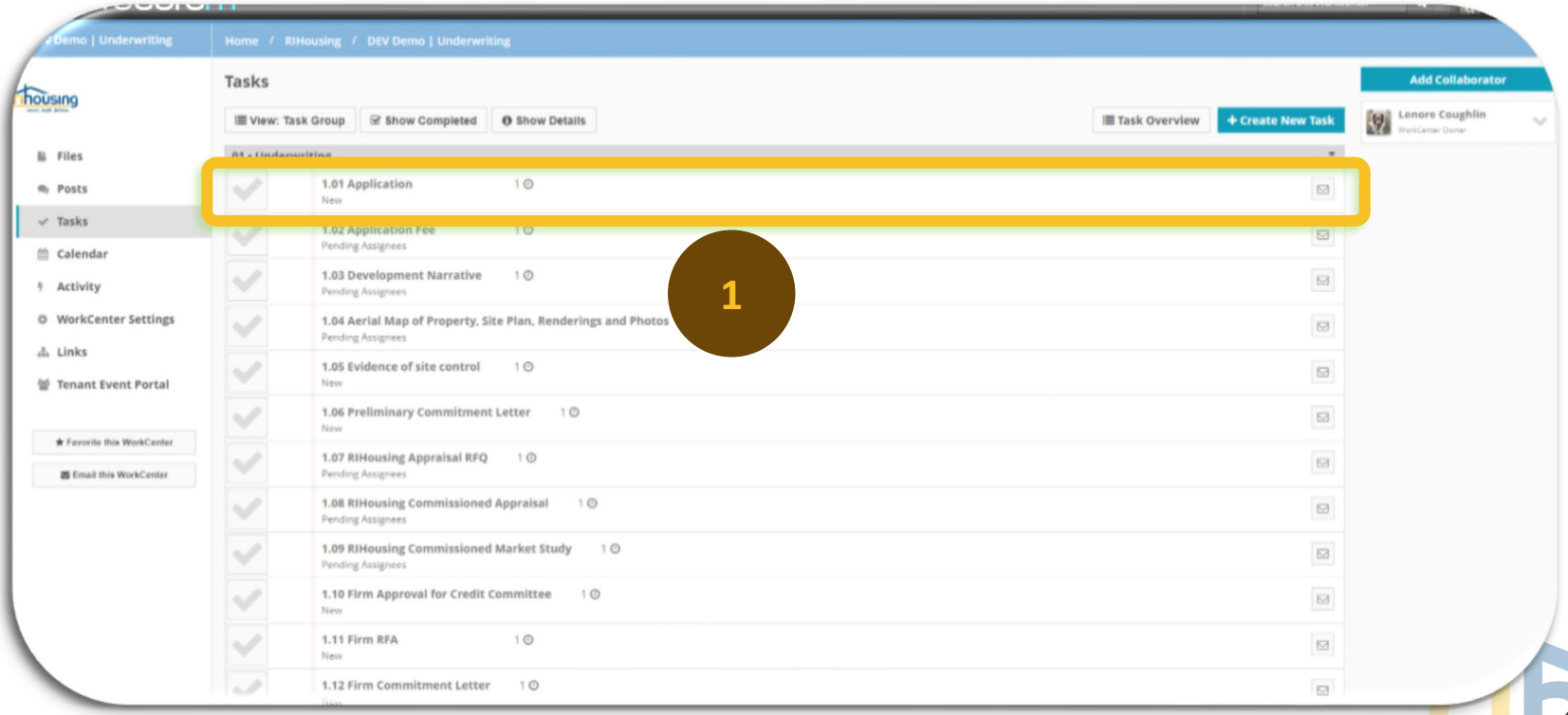
Task Details

Hide Details for a simple, compact list. **Show Details** for more information.



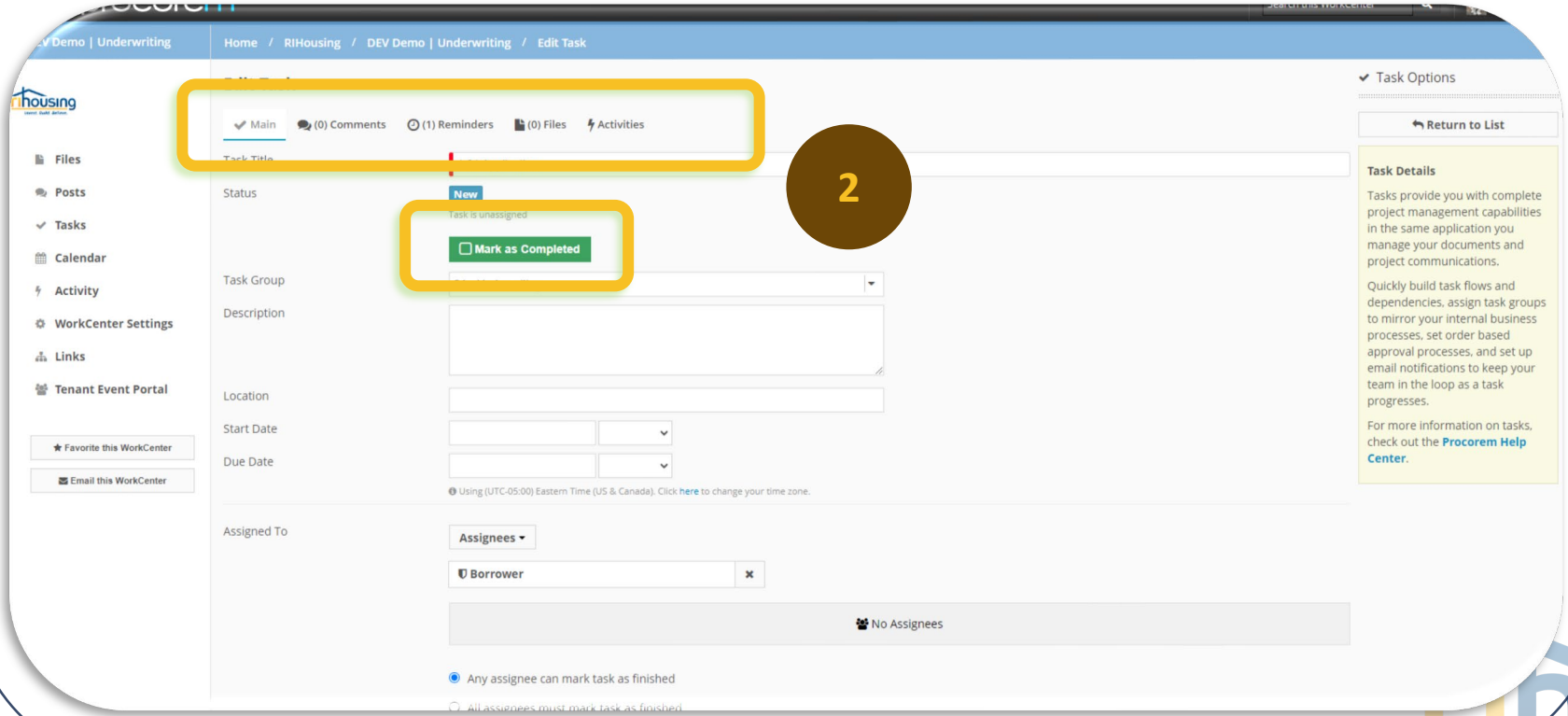
Task Details

1 Click on a task to see the Task Details screen.



Task Details

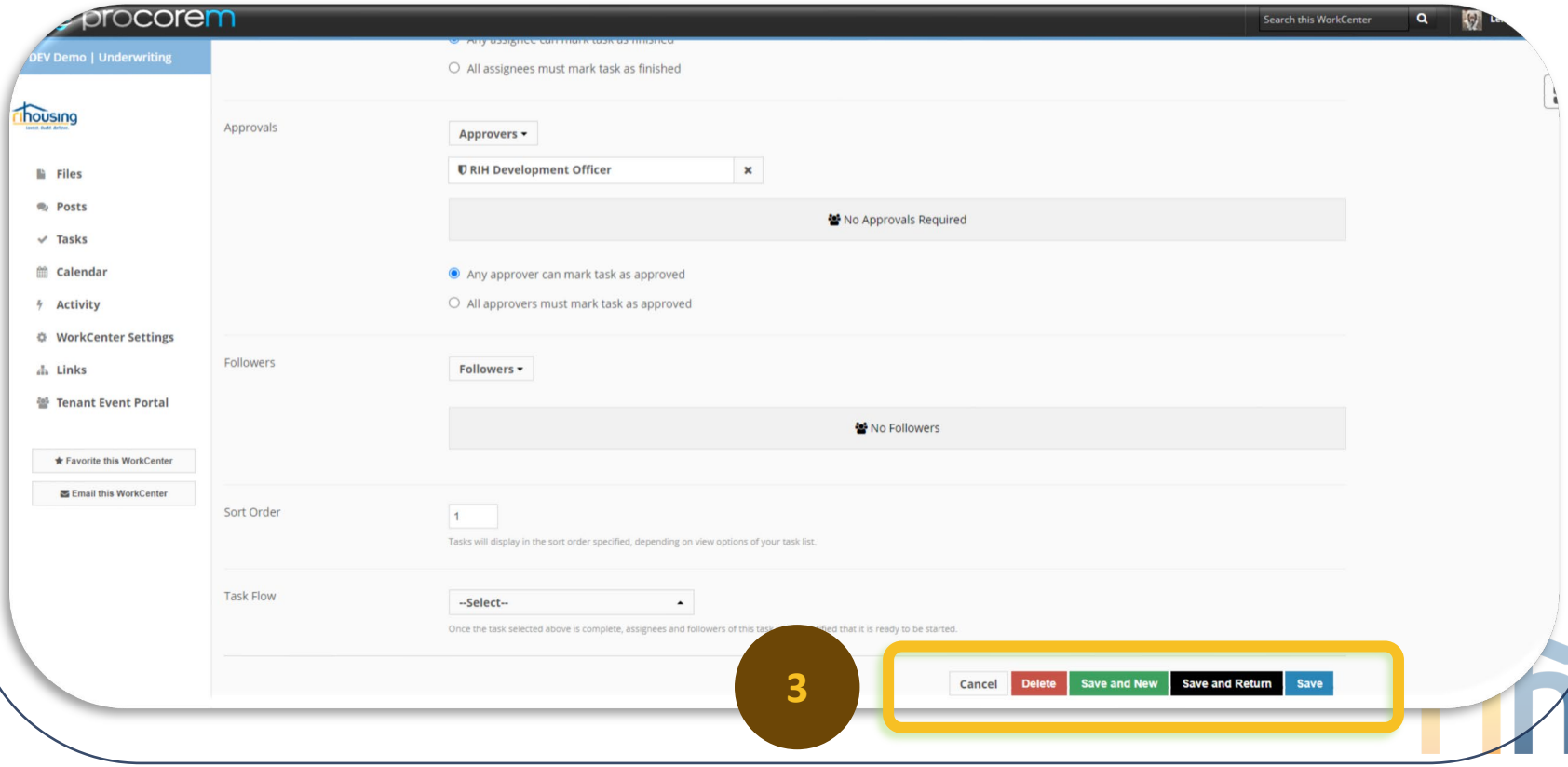
2 Complete the task or add Comments and Files as applicable.



Task Details

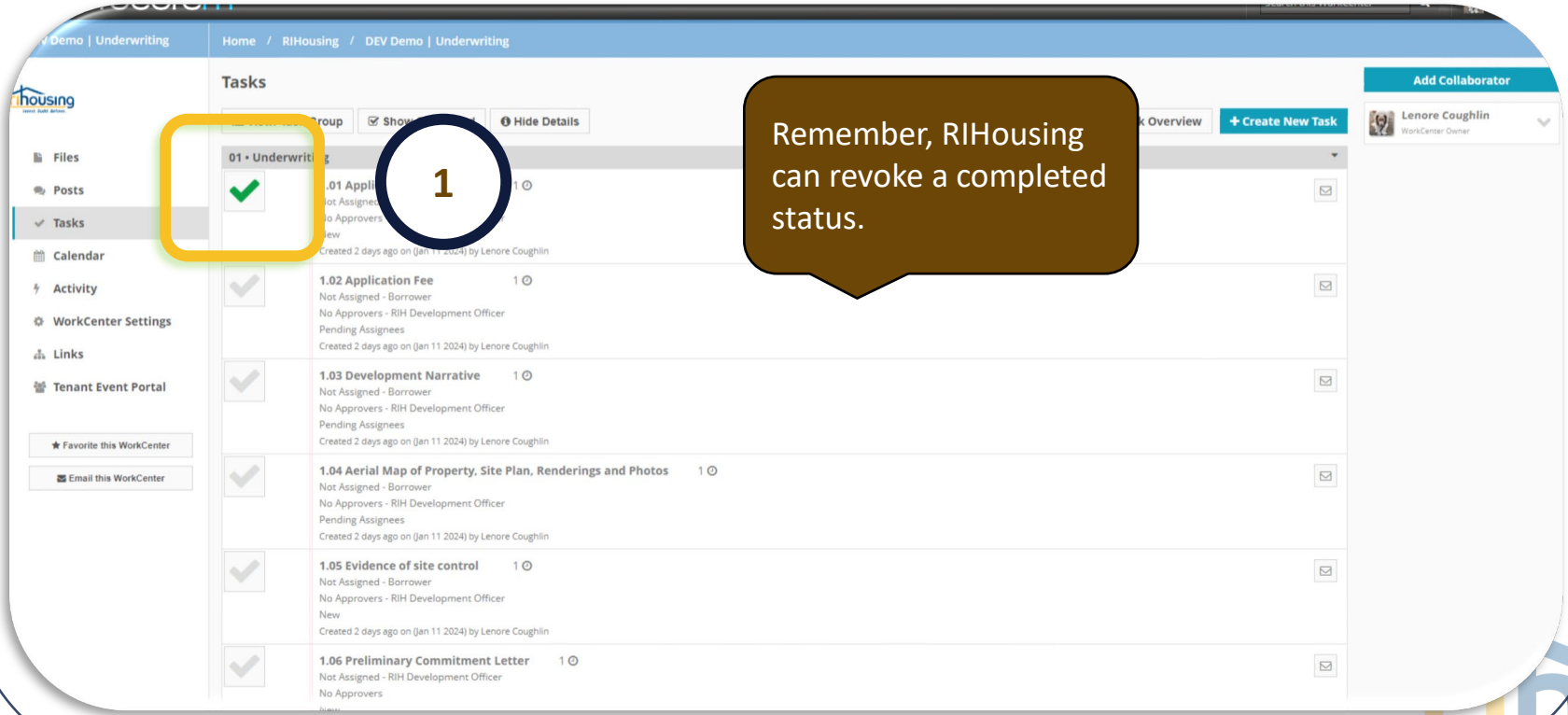
3

Select **Cancel** if you've taken no action but return to the task list. **Save and Return** will save your progress and go back to the task list.



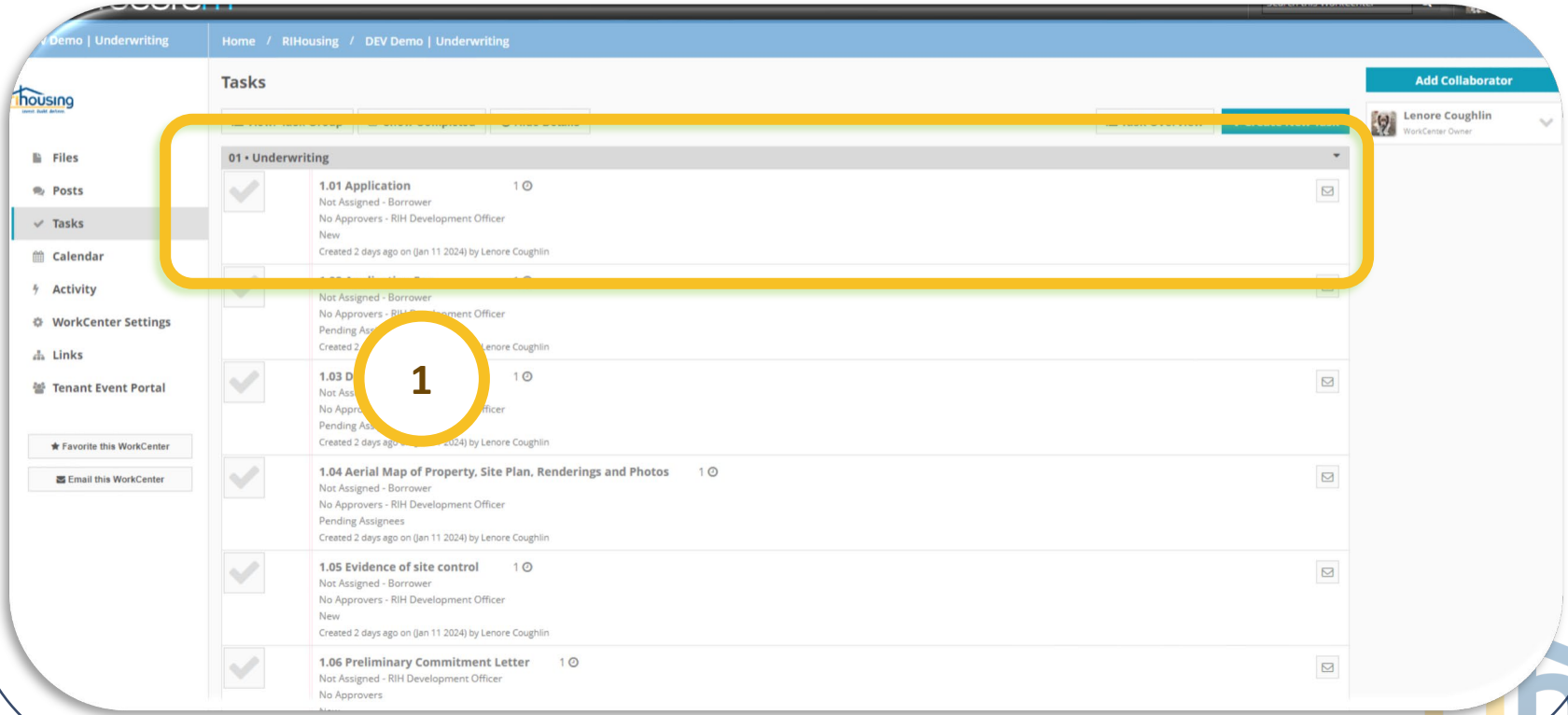
Completing Tasks | Option 1

1. Click on the empty check box to turn the icon green; this indicates that the task has been completed.



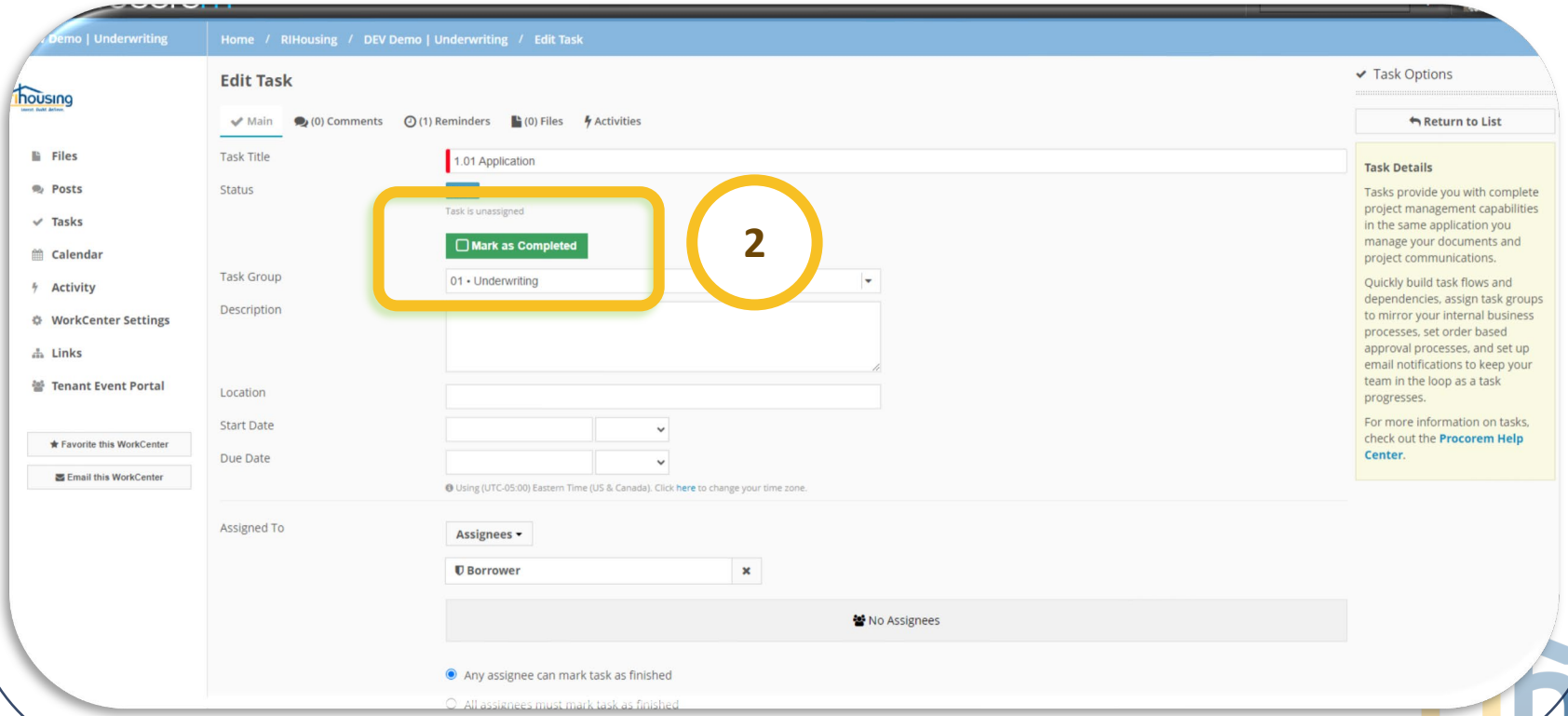
Completing Tasks | Option 2

1 Click on the task to be completed to open the Task Details screen



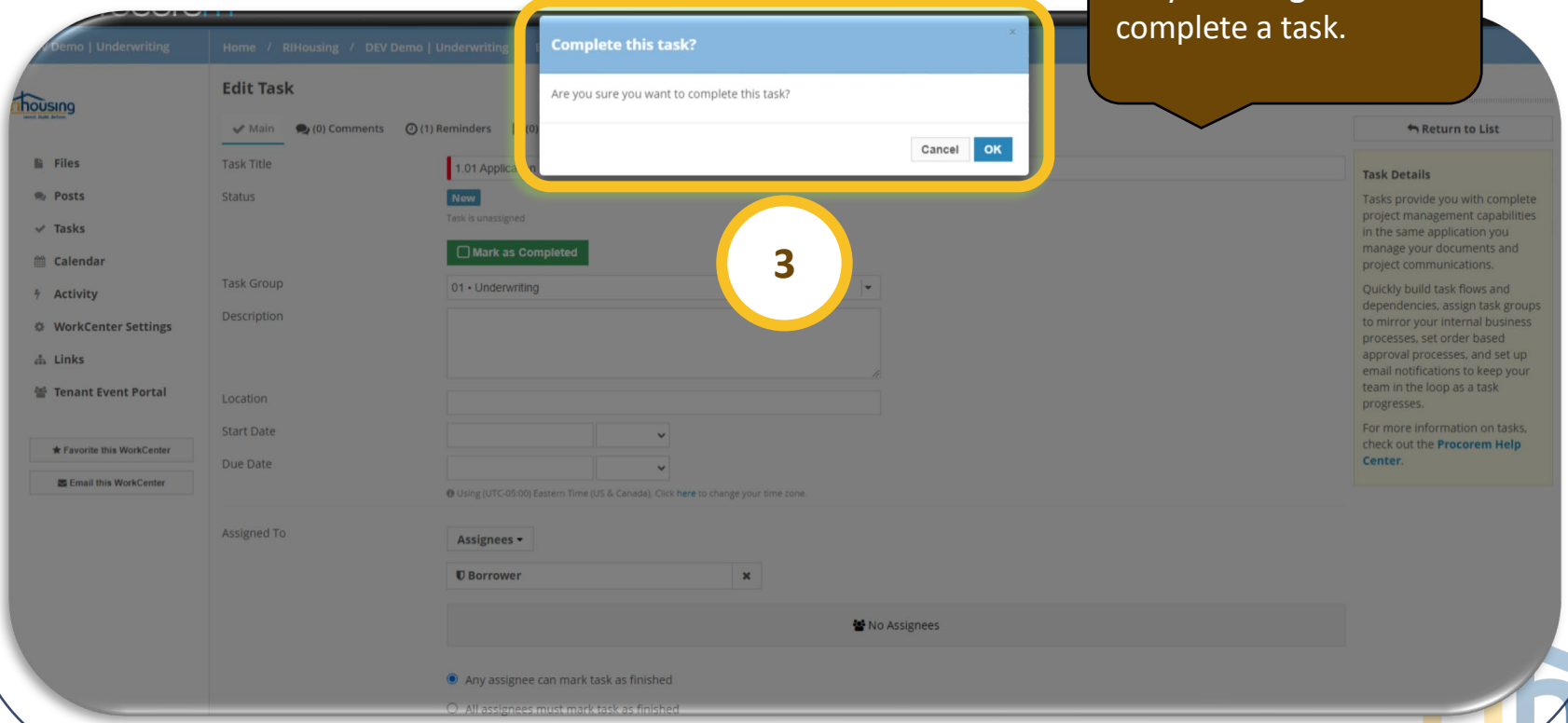
Completing Tasks | Option 2

2 Click **Mark as Completed**.



Completing Tasks | Option 2

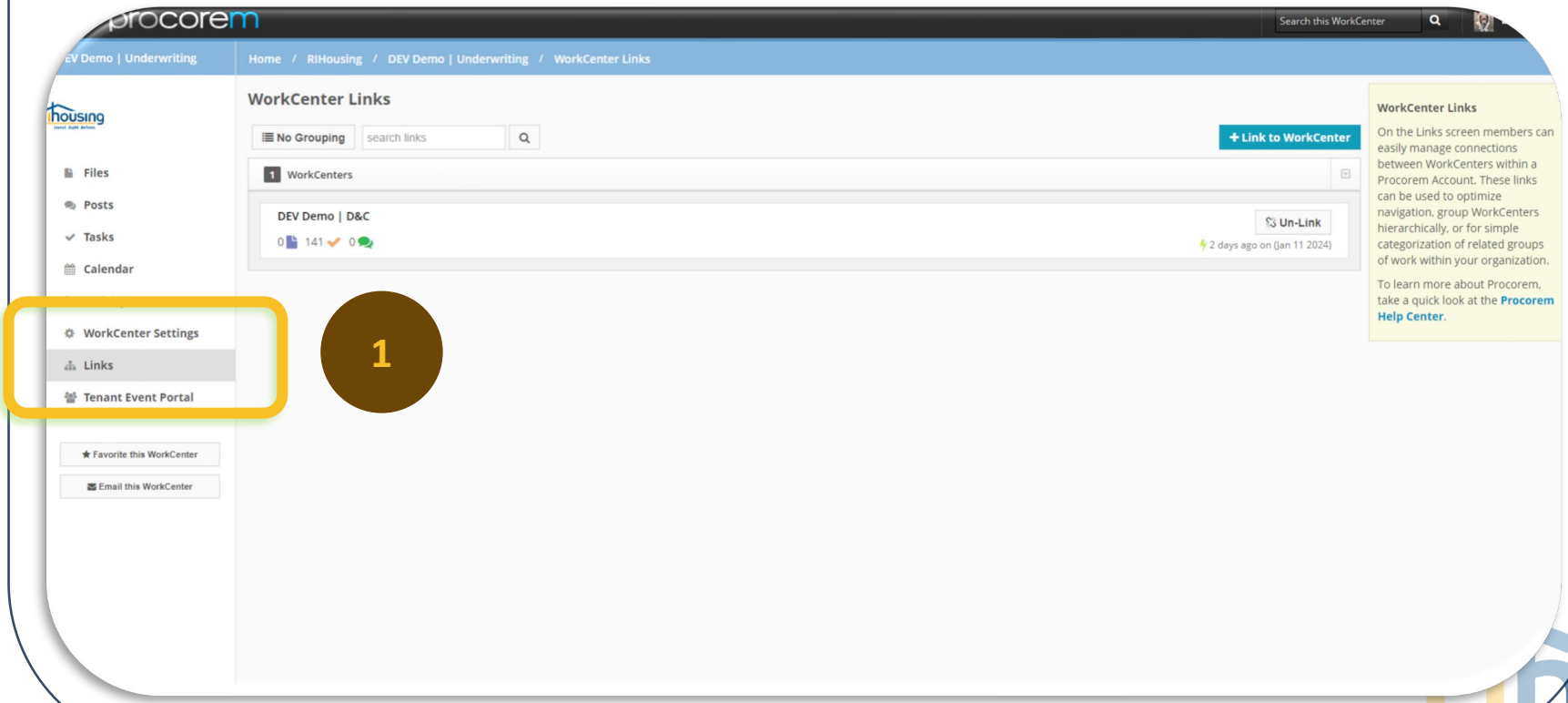
3 Click **OK**.



Links

Links

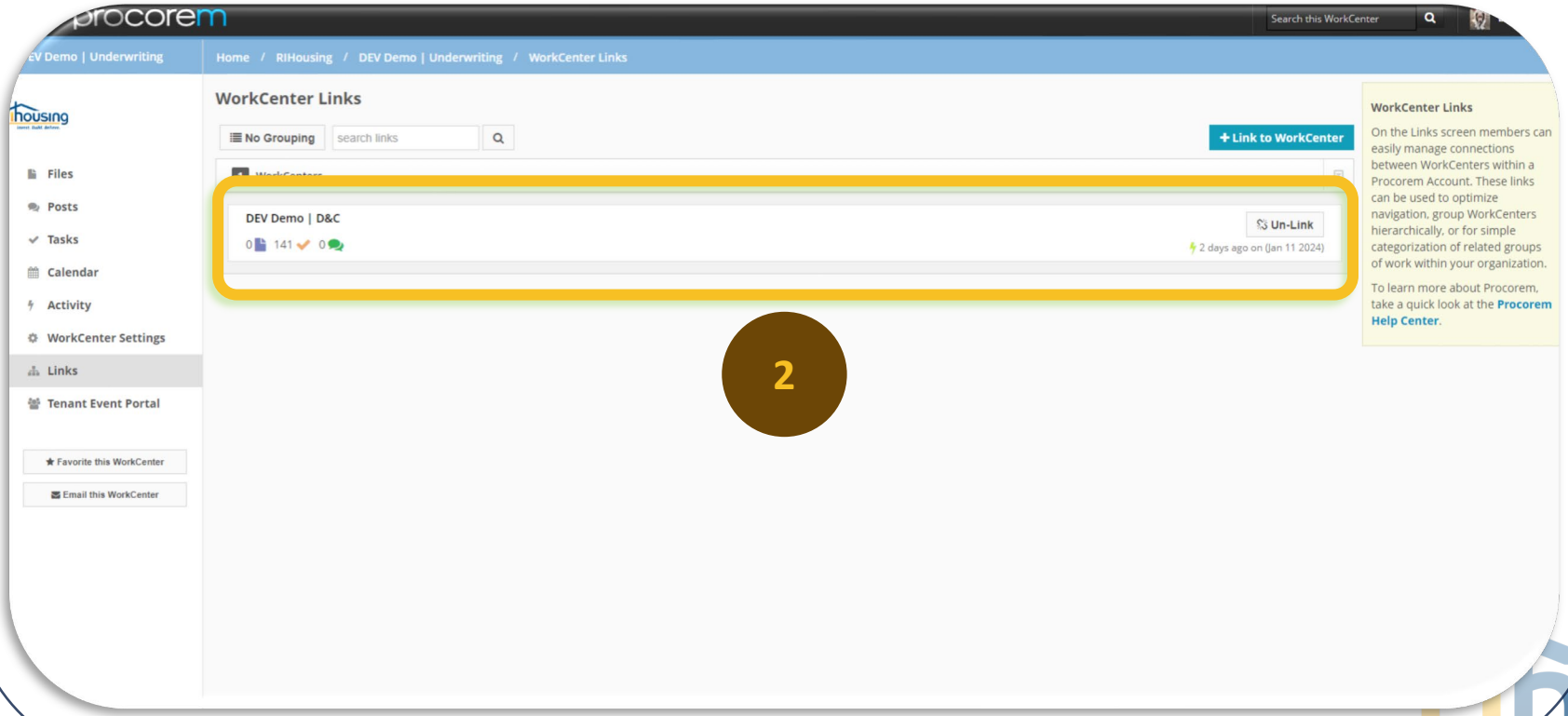
1 Some workcenters have links to other workcenters built in. Select the **Links** option from the left menu.



Links

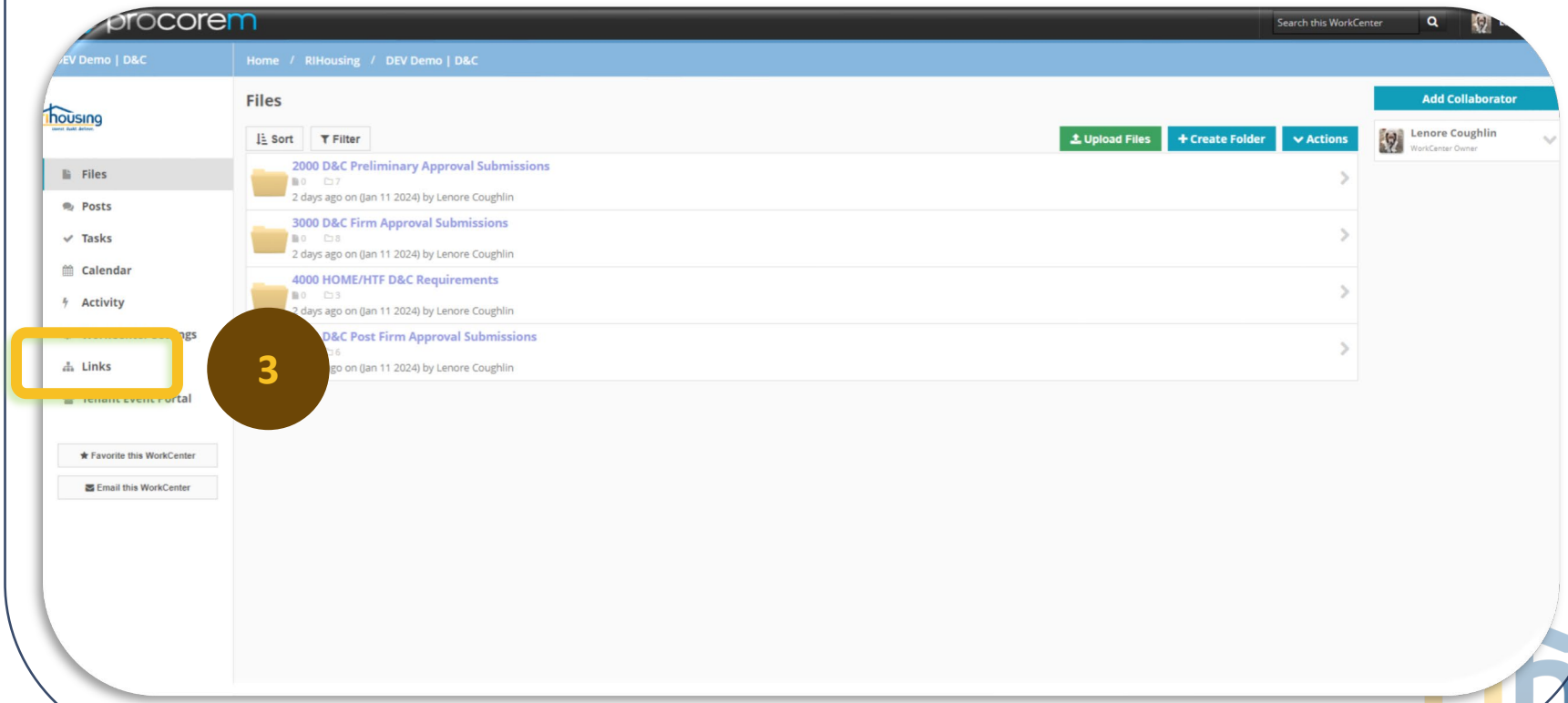
2

If the list is blank, there are no links. If links exist, they will be displayed in a list format below. Click to navigate to another workcenter.



Links

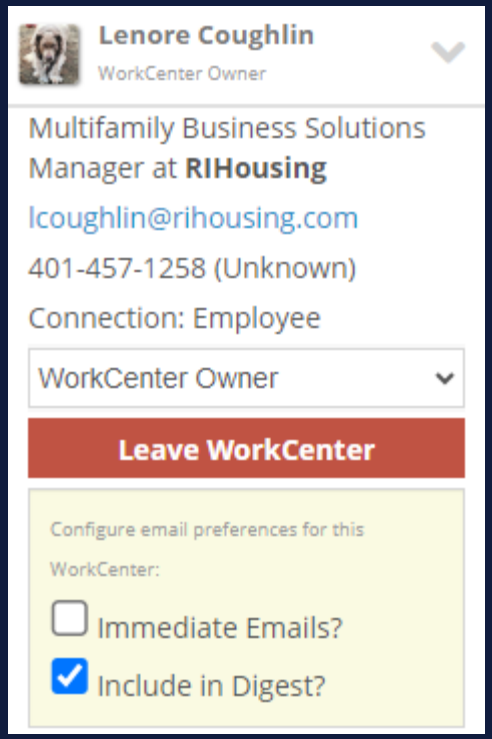
3 Return to the previous workcenter by accessing Links. Repeat steps 1-2.



Procorem Help

Procorem E-mail Frequency

Access each workcenter and un-select **Immediate E-mails** to receive one digest e-mail daily rather than receive an e-mail for each activity in the workcenter.



Visit the Trainings & Opportunities page for all available Procorem Resources

Questions

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