Welcome to Connect

Learn, Share, Grow

CalCPA Connect brings members together on current issues, opportunities and developments in specialized communities to help you focus on specific technical areas of your practice or business, in addition to growing your professional network. These hubs will include conversations, resources, upcoming events and more—all designed to help you connect with CalCPA and with members statewide, building your knowledge, expertise and community.

Welcome to Connect—our new online interest group platform. Our goal is to create a space where members can connect with each other to build meaningful community. You'll find relevant articles, CalCPA updates and other need-to-know info to help you make the most of your membership and build your career.
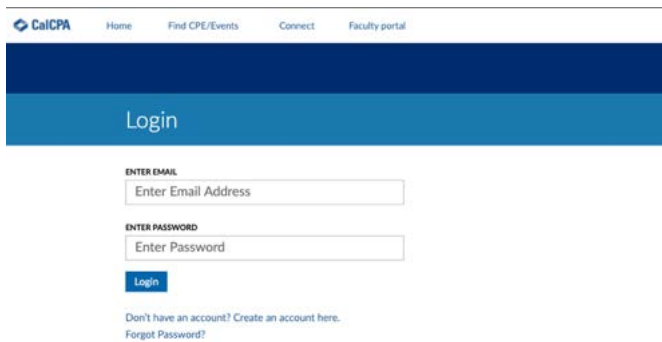
In this environment, members can see who else is in the chapter, learn about upcoming events and interact with each other through messaging, article posting and commenting, and discussion forum.

If you have any questions about how to use the platform, feel free to email the staff contact listed in the respective Connect leadership box or email calcpaconnect@calcpa.org.

Below are easy instructions to make the most of Connect's main features.

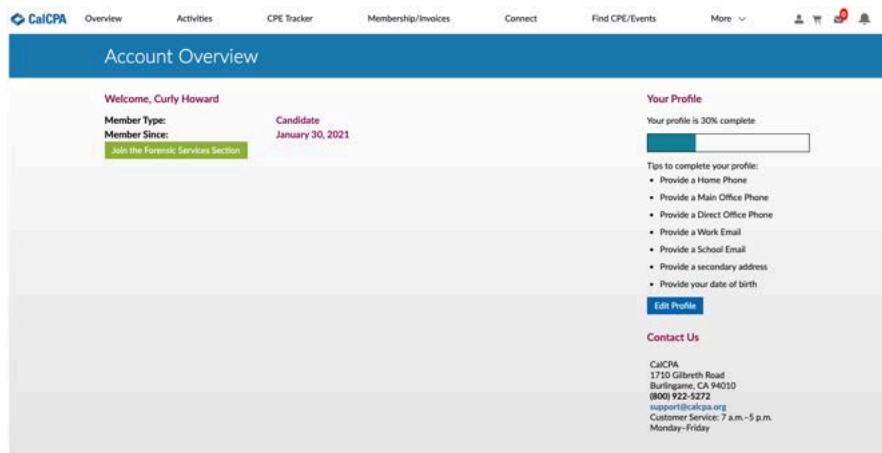## How do I Log In/Retrieve Password/Create an Account?

To log in, visit https://community.calcpa.org/ and enter the email and password you would use to log into CalCPA's main website to purchase products or make changes to your account, and click Login:

If you have forgotten your password, click "Forgot Password" in the above window. Or if you do not have an account, click "Create and account here" in the above window and follow the prompts.
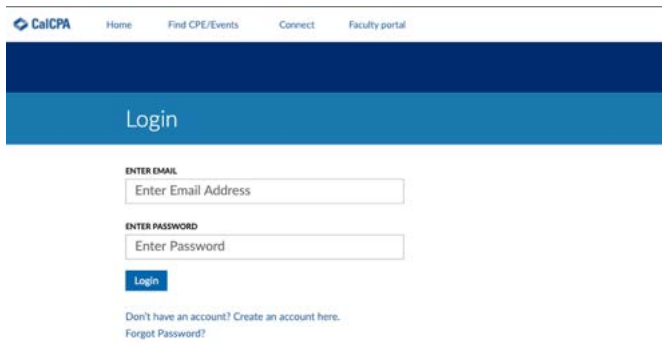
Once you login, you'll be taken to your Account Overview page, where you can edit your profile, search CPE, visit Connect and more:

How do I Visit Connect?

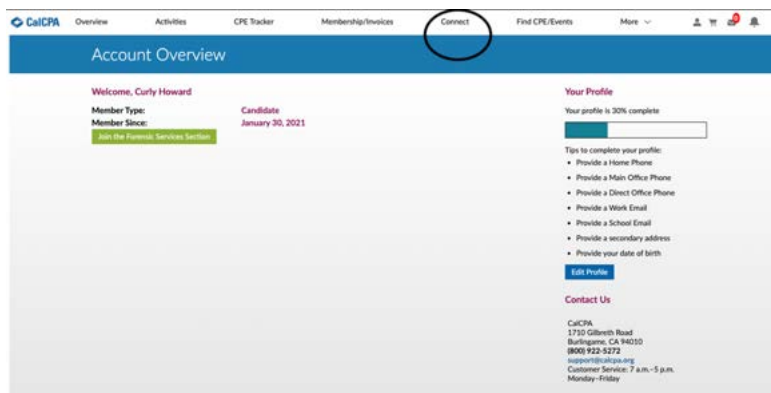Go to https://community.calcpa.org/ and enter the email and password you would use to log into CalCPA's main website to purchase products or make changes to your account, and click Login:

From here, you can navigate to Connect in one of two ways:
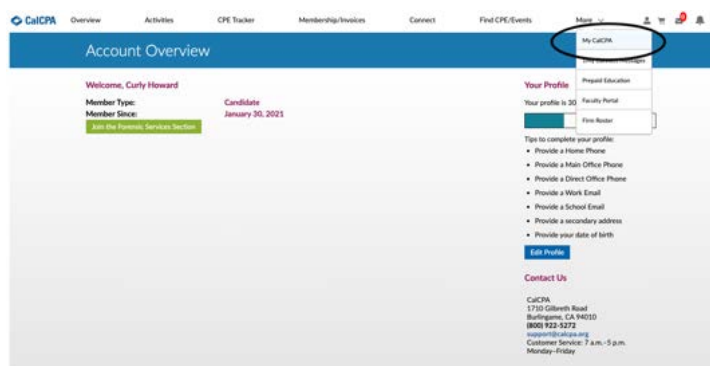
Click Connect in the top menu bar, which will take you to the Connect homepage.

OR

Click the More tab in the top menu bar and select My CalCPA from the drop-down menu:

This will display a list of all the Connect communities you are a member of and clicking on any of the names will take you to that respective Connect community. This menu is available from anywhere in the Connect community.

My Chapter indicates the preferred chapter we have on your member record in our database.
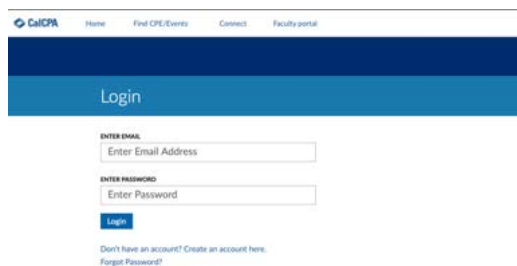**My Connects** are the Connect communities you are a member of.
My State Committees are any CalCPA state committees you are an official member of.

NOTE: CalCPA members have been auto-populated into their respective preferred chapter Connect communities and the Connect communities of our state MAP, GR and PFP committees if they are members of those state committees.

Though members will have been auto-populated in various Connect communities, users will have to officially join those communities. See **How do I Join a Connect Community?** In this guide for instructions.
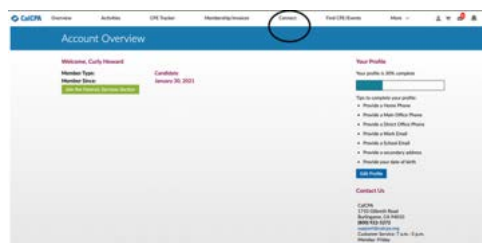
How do I Join a Connect Community?

To gain the most functionality of Connect—such as starting a discussion, reading articles, etc.—you must be a member of the Connect community that interests you. To do so: Go to https://community.calcpa.org/ and enter the email and password you would use to log into CalCPA's main website to purchase products or make changes to your account, and click Login:
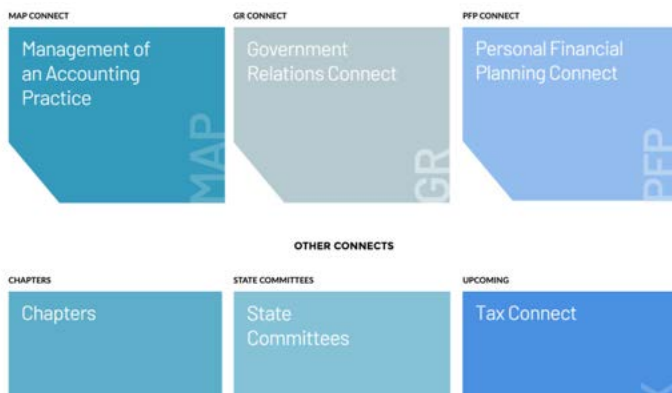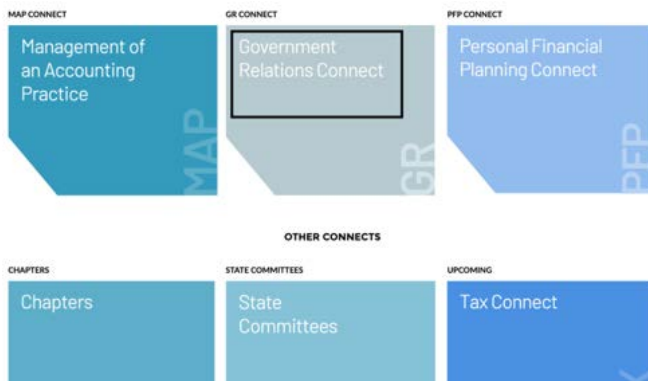

Then click Connect on the page that appears:

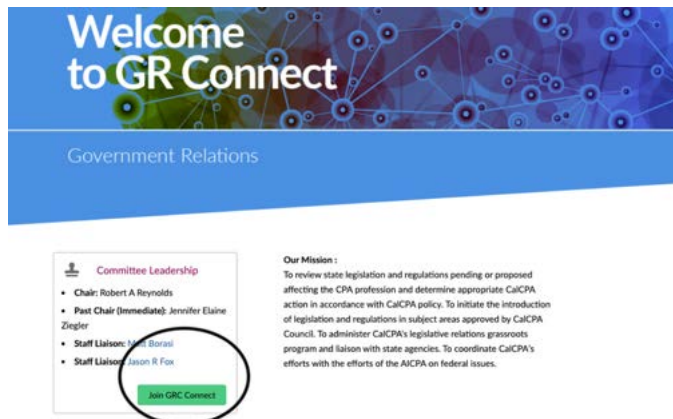This will take you to the Connect homepage:

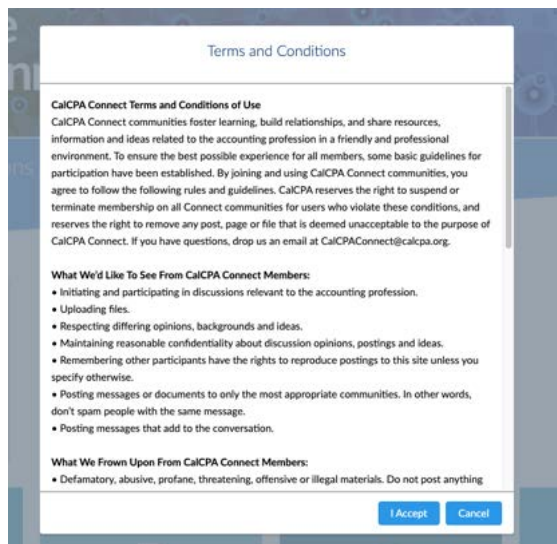Scroll down the page and you'll see Connects you can join:

Select a Connect community you wish to join (in this case, Government Relations):

Select join GRC Connect:

Read the Terms & Conditions of the site and click I Accept:

NOTE: Currently, you will be asked to accept the Terms & Conditions for each Connect community you join.

The page will then refresh and you'll see Join GRC Connect has changed to You're a Member:

How do I Post an Article?
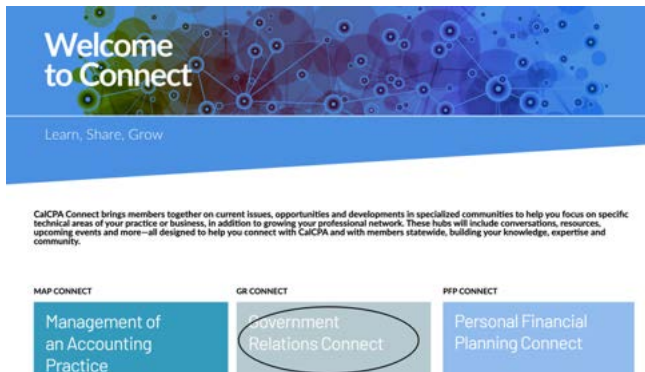
After logging in to the Connect homepage—https://community.calcpa.org/—find and click on the Connect community you wish to work with (in this example: Government Relations Connect):

Select Join GRC Connect, if you are already not a member. (**Note**: You must be a member of a respective Connect community to experience full functionality.)
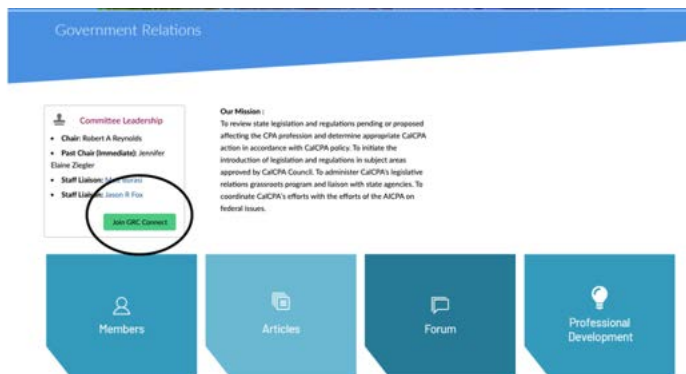
Read and click I Accept to the Terms & Conditions:

Select the Articles tile:
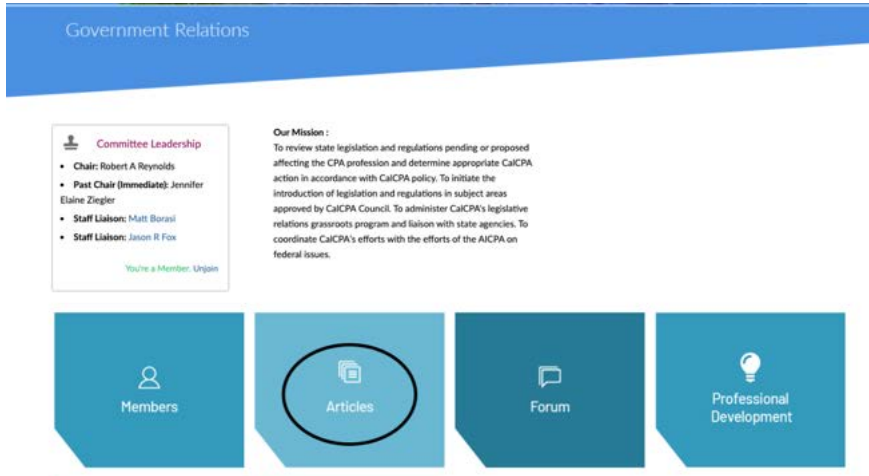
Select Insert Article:
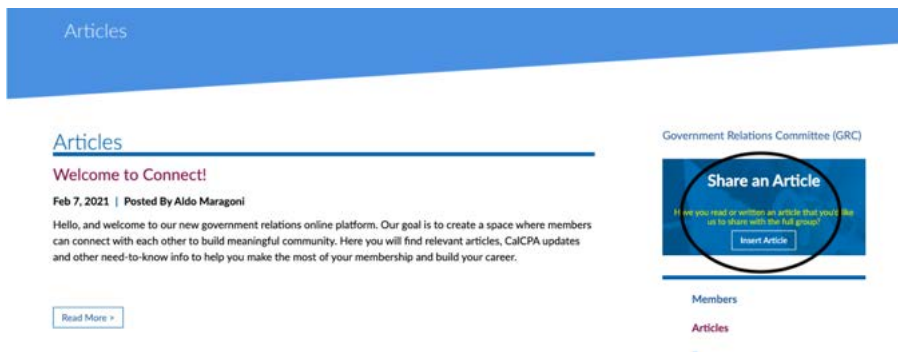
Complete the fields in the pop-up that appears and click Submit Article:
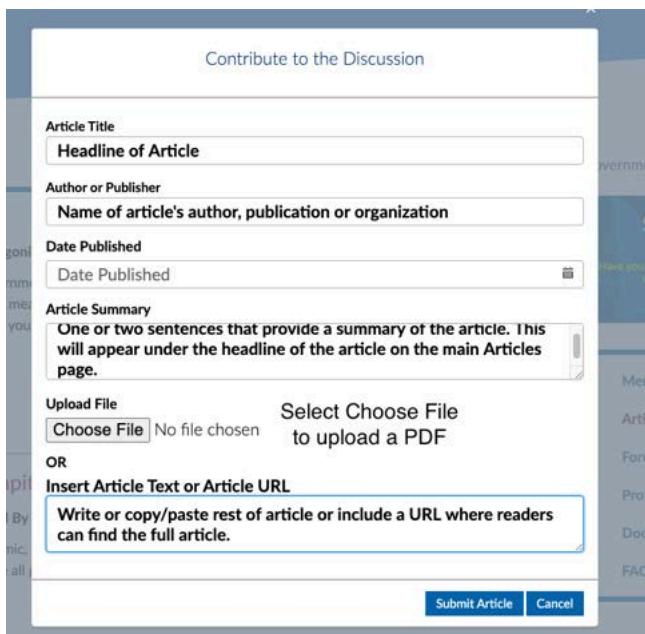
The page will refresh and you will see your article posted:

Articles

Articles

Headline of Article

Feb 7, 2021 | **By Name of article's author, publication or organization** | **Posted By Nick Gatsby**

One or two sentences that provide a summary of the article. This will appear under the headline of the article on the main Articles page.

Read More >

How do I Comment on an Article?

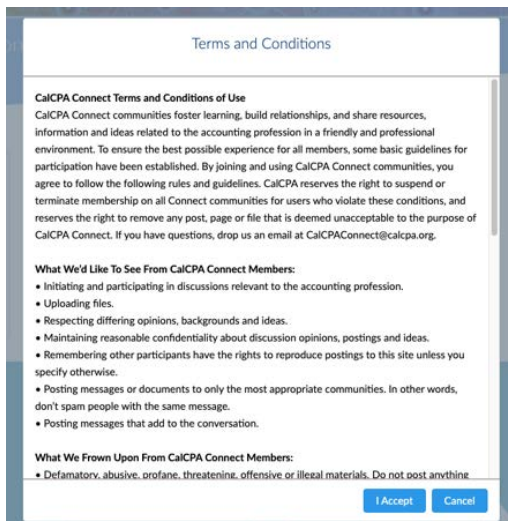After logging in to the Connect homepage—https://community.calcpa.org/—find and click on the Connect community you wish to work with (in this example: Government Relations Connect):


Select Join GRC Connect, if you are not already a member. (**Note**: You must be a member of a respective Connect community to experience full functionality.)

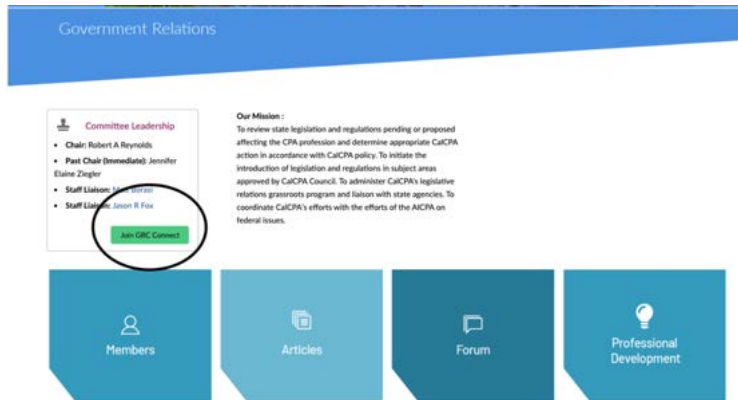

Read and click I Accept to the Terms & Conditions:

Select Articles tile:

Click Read More to see the full article:

Scroll to bottom of article, where you'll see a comment box. Insert your comment and click Share. Your comment will now appear at the bottom of the article, visible to users.

How do I Start a Discussion?

After logging in to the Connect homepage—https://community.calcpa.org/—find and click on the Connect community you wish to work with (in this example: Government Relations Connect):
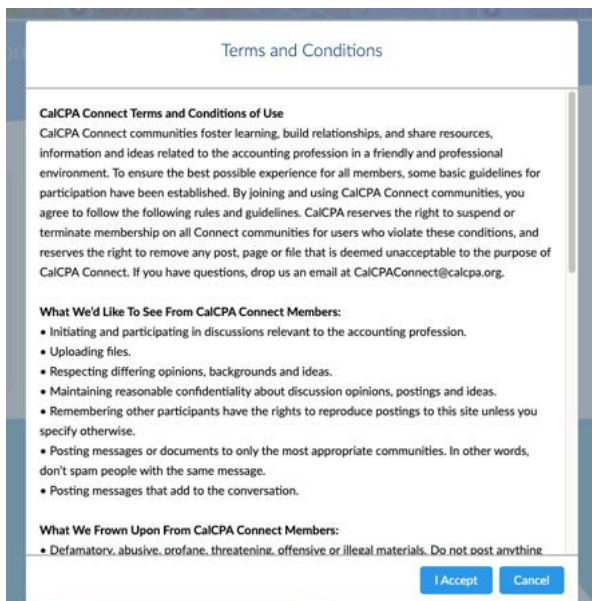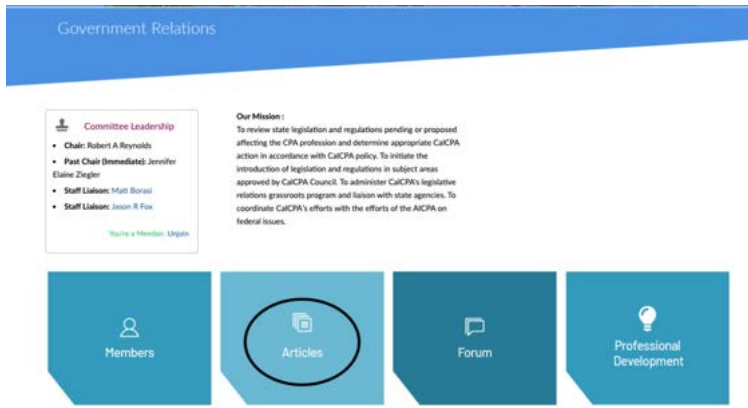

Select Join GRC Connect, if you are already not a member. (**Note**: You must be a member of a respective Connect community to experience full functionality.)

Read and click I Accept to the Terms & Conditions:

Select the Forum tile:

Select Start a Discussion:

Complete the pop-up that appears and select Ask. (**NOTE**: From here, you can only post discussions in that Connect community you are working in. If you'd like to start post a discussion in a different Connect community, you must navigate to that community and follow the steps outlined here.)
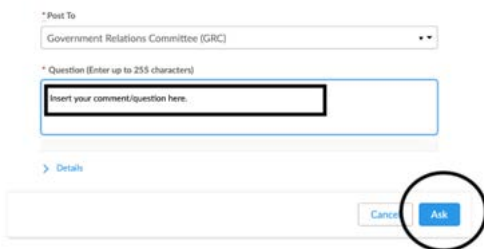
The page will refresh and you will see your question posted:
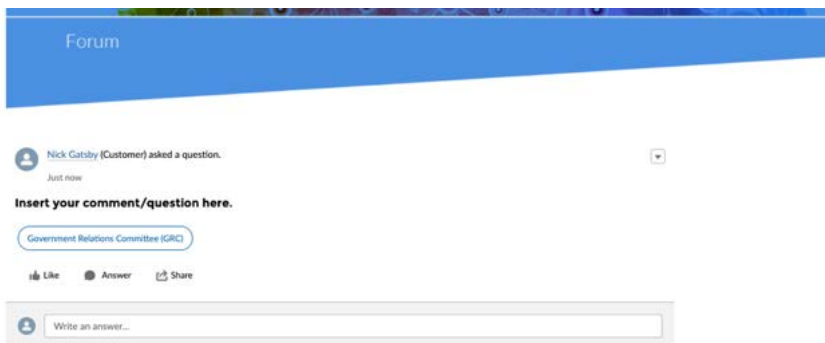
If you need to edit or delete your question, click the down arrow to the right of your question and select edit or delete:

How do I Message Other Connect Members?

After logging in to the Connect homepage—https://community.calcpa.org/—you can see a compilation of any messages by clicking on the envelope icon in the top menu bar OR click on More in top menu bar and scroll to My Connect Messages in the drop-down:

You will then be taken to your messages:
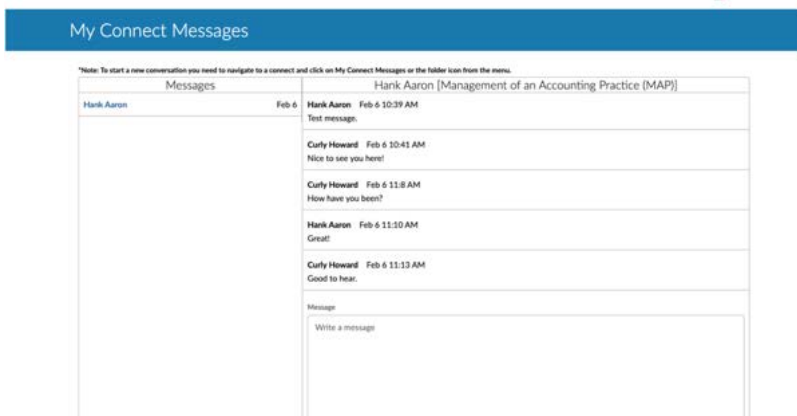
From here, you can respond to any messages you may have received by clicking on the sender's name in the left-hand box, inserting your comment in the Message box and click Send.

NOTE: You cannot create a new message from this screen. Currently, to create new messages, you must be on a specific Connect community site and can only message those members of that respective Connect. Look for future enhancements where you'll be able to message all Connect users across the platform.

To see/create/send messages within a specific Connect, find and click on the Connect community you wish to work with (in this example: Government Relations Connect):

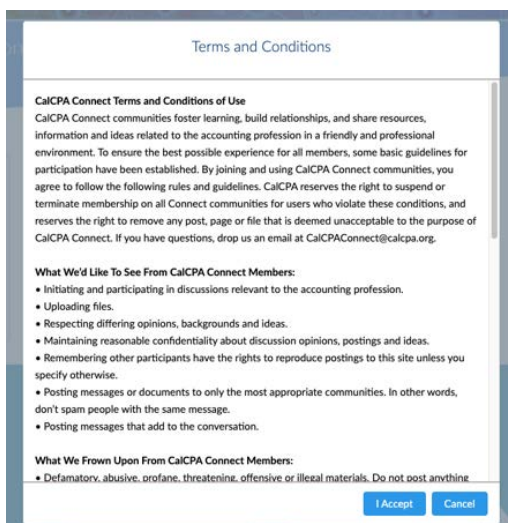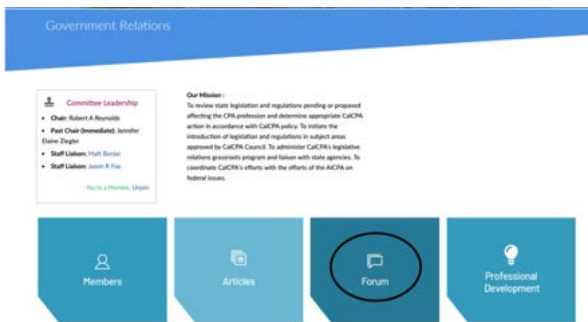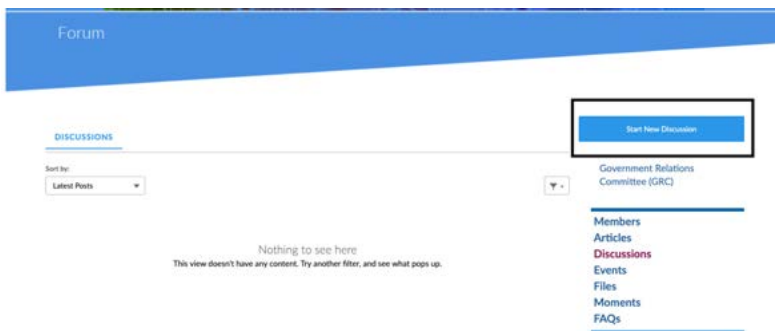Select Join GRC Connect, if you are already not a member. (**Note**: You must be a member of a respective Connect community to experience full functionality, including messaging other members within a specific Connect community.)

Read and click I Accept to the Terms & Conditions:

Select the envelope icon in top menu bar OR click on More in top menu bar and scroll to My Connect Messages in the drop-down:
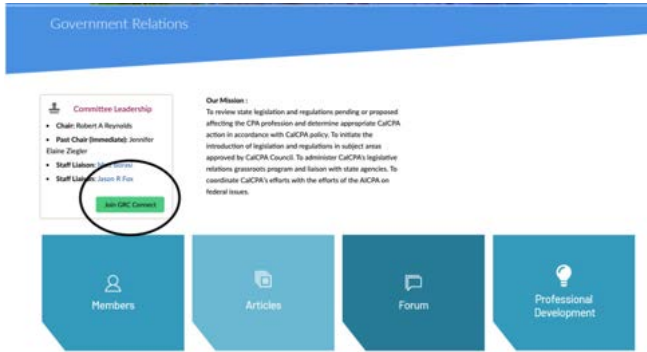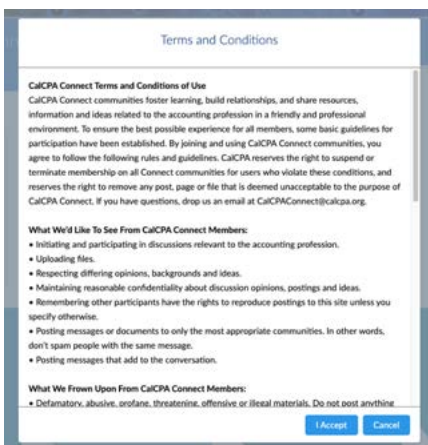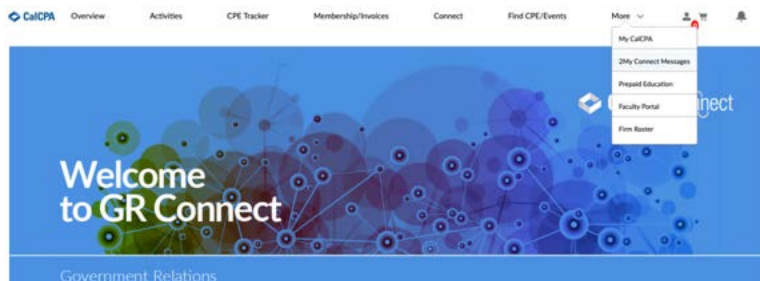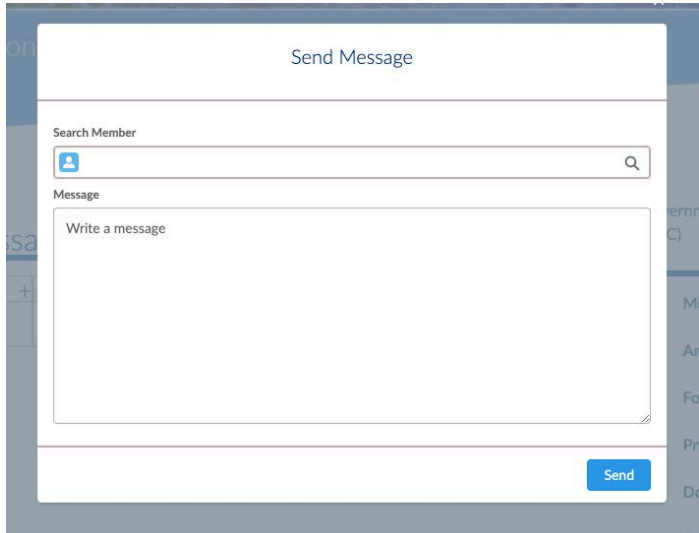

You'll then see a compilation of any messages specific to that Connect community. Click on the + symbol in the left-hand box to create a new message:

In the screen that appears, start typing in the name of the person you wish to message, insert your message in the Message box and click Send.

How do I Share a Document?

While users cannot upload documents, such as PDFs, PPT or Word—directly from the Documents section of a Connect community, they can share documents in one of two ways:

1. Via **Share an Article feature** (see above How do I Share an Article instructions where you can include an attachment)
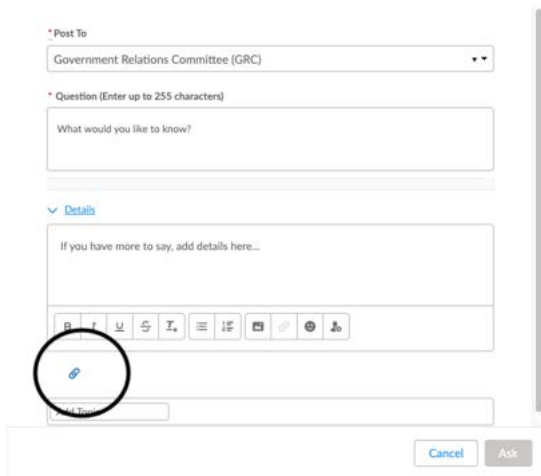
OR

2. Via **Start a Discussion feature:**

Follow the steps outlined above in How do I Start a Discussion and when you get to this pop-up, click Details:

After including your question/comment, click the paperclip to attach your file and click Ask:

The page will refresh with your question/comment and attachment that users can open/download: