

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.

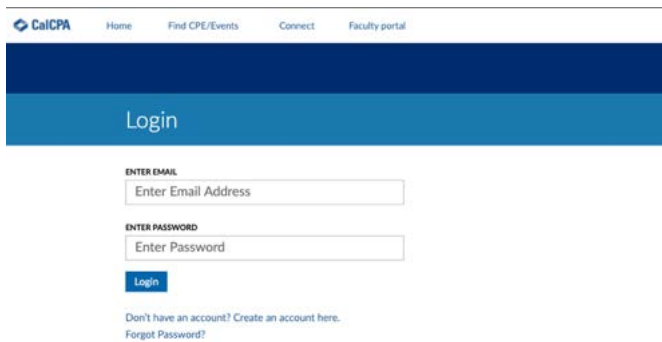
In this environment, members can see who else is in the chapter, learn about upcoming events and interact with each other through messaging, article posting and commenting, and discussion forum.

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?

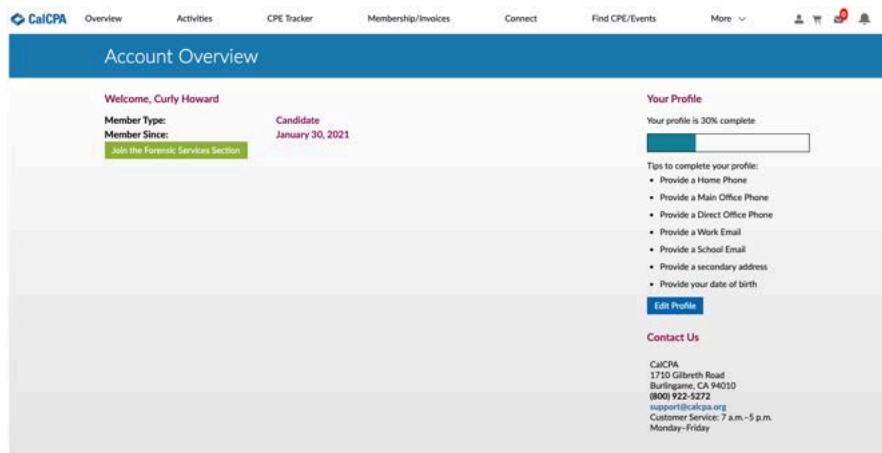
To log in, visit <https://community.calcpa.org/> and enter the email and password you would use to log into CalCPA's main website to purchase products or make changes to your account, and click Login:



The screenshot shows the CalCPA login page. At the top, there is a navigation bar with the CalCPA logo and links for Home, Find CPE/Events, Connect, and Faculty portal. Below the navigation bar is a large blue header with the word "Login" in white. Underneath the header, there are two input fields: "ENTER EMAIL" with a placeholder "Enter Email Address" and "ENTER PASSWORD" with a placeholder "Enter Password". Below these fields is a blue "Login" button. At the bottom of the form, there are two links: "Don't have an account? Create an account here." and "Forgot Password?".

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.

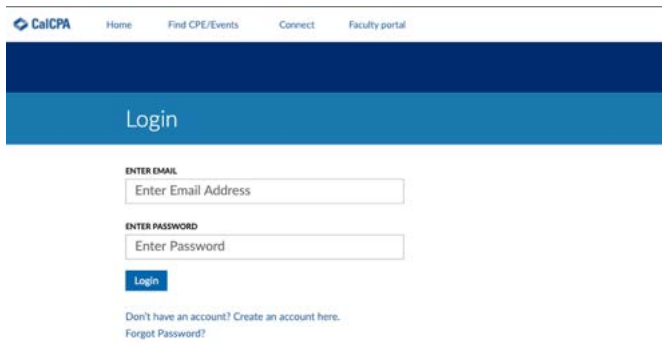
Once you login, you'll be taken to your Account Overview page, where you can edit your profile, search CPE, visit Connect and more:



The screenshot shows the CalCPA Account Overview page. At the top, there is a navigation bar with the CalCPA logo and links for Overview, Activities, CPE Tracker, Membership/Invoices, Connect, Find CPE/Events, and More. Below the navigation bar is a blue header with the text "Account Overview". The main content area is divided into three sections. The first section is a welcome message: "Welcome, Curly Howard" followed by "Member Type: Candidate" and "Member Since: January 30, 2021". There is a green button that says "Join the Forensic Services Section". The second section is "Your Profile" with a progress bar showing "Your profile is 30% complete". Below this is a list of "Tips to complete your profile:" including "Provide a Home Phone", "Provide a Main Office Phone", "Provide a Direct Office Phone", "Provide a Work Email", "Provide a School Email", "Provide a secondary address", and "Provide your date of birth". There is a blue "Edit Profile" button. The third section is "Contact Us" with the following information: "CalCPA, 1710 Gilbert Road, Burlingame, CA 94010, (800) 922-5272, support@calcpa.org, Customer Service: 7 a.m. - 5 p.m. Monday - Friday".

How do I Visit Connect?

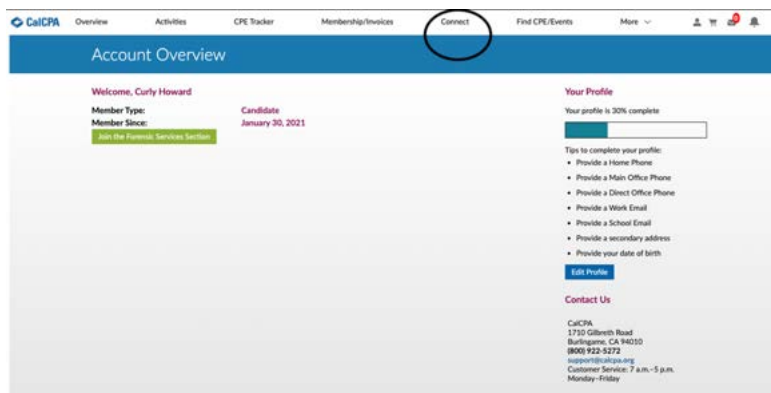
Go to <https://community.calcpa.org/> and enter the email and password you would use to log into CalCPA's main website to purchase products or make changes to your account, and click Login:



The screenshot shows the CalCPA login page. At the top, there is a navigation bar with links for Home, Find CPE/Events, Connect, and Faculty portal. Below the navigation bar is a large blue header with the word "Login" in white. Underneath the header, there are two input fields: "ENTER EMAIL" with the placeholder "Enter Email Address" and "ENTER PASSWORD" with the placeholder "Enter Password". A blue "Login" button is positioned below the password field. At the bottom of the login section, there are two links: "Don't have an account? Create an account here." and "Forgot Password?".

From here, you can navigate to Connect in one of two ways:

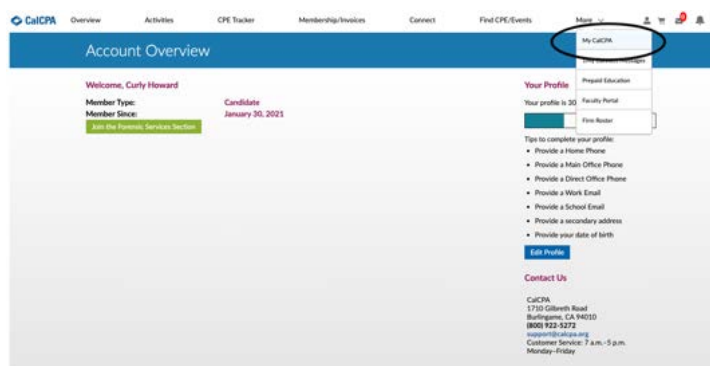
Click Connect in the top menu bar, which will take you to the Connect homepage.



The screenshot shows the CalCPA Account Overview page. The top navigation bar includes links for Overview, Activities, CPE Tracker, Membership/Invoices, Connect, Find CPE/Events, and More. The "Connect" link is circled in black. Below the navigation bar, the page displays "Account Overview" for a user named Curly Howard. The user's profile information is shown, including Member Type (Candidate), Member Since (January 30, 2021), and a link to "Join the Forum - Services Section". On the right side, there is a "Your Profile" section indicating that the profile is 30% complete. A list of tips to complete the profile is provided, including providing a Home Phone, Main Office Phone, Direct Office Phone, Work Email, School Email, secondary address, and date of birth. An "Edit Profile" button is located below the tips. At the bottom right, there is a "Contact Us" section with CalCPA's address (1710 Gilbreth Road, Burlingame, CA 94010), phone number (800) 922-5272, email (info@calcpa.org), and customer service hours (7 a.m. - 5 p.m. Monday - Friday).

OR

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



The screenshot shows the CalCPA Account Overview page, similar to the previous one, but with the "More" menu open. The "More" menu is a drop-down menu that is open, showing options for "My CalCPA" and "My Profile". The "My CalCPA" option is circled in black. The rest of the page content, including the user's profile information and the "Your Profile" section, remains the same as in the previous screenshot.

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.

The screenshot shows a user interface for 'My CalCPA'. It features three main sections, each with a blue header bar and a list of items below it:

- My Chapter:** A blue header bar with the text 'My Chapter'. Below it is a table with one row: 'Chapter' (highlighted in blue) and 'Sacramento'.
- My Connects:** A blue header bar with the text 'My Connects'. Below it is a table with five rows: 'Connect' (highlighted in blue), 'San Joaquin', 'East Bay', 'Inland Empire', and 'Sacramento'. Below these are two more rows: 'Government Relations Committee (GRC)' and 'Personal Financial Planning (PFP)'.
- My State Committees:** A blue header bar with the text 'My State Committees'. Below it is a table with four columns: 'Committee', 'Position', 'Start Date', and 'End Date'.

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.

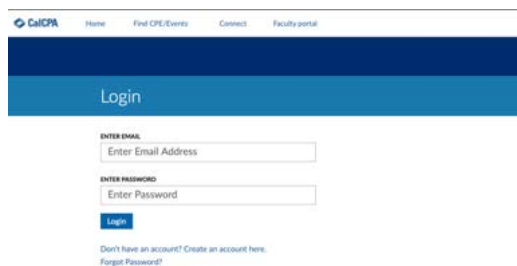
My State Committees are any CalCPA state committees you are an official member of.

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.

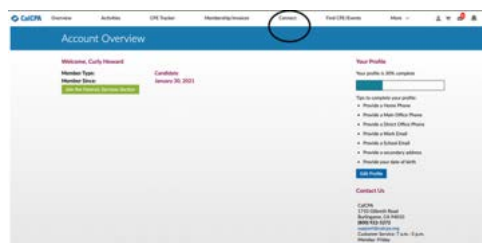
How do I Join a Connect Community?

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:



The screenshot shows the CalCPA login page. At the top, there is a navigation bar with links for Home, Find CPE/Events, Connect, and Faculty portal. Below the navigation bar is a large blue header with the word "Login" in white. Underneath, there are two input fields: "ENTER EMAIL" with a sub-label "Enter Email Address" and "ENTER PASSWORD" with a sub-label "Enter Password". A blue "Login" button is positioned below the password field. At the bottom of the login form, there are two links: "Don't have an account? Create an account here." and "Forgot Password?".

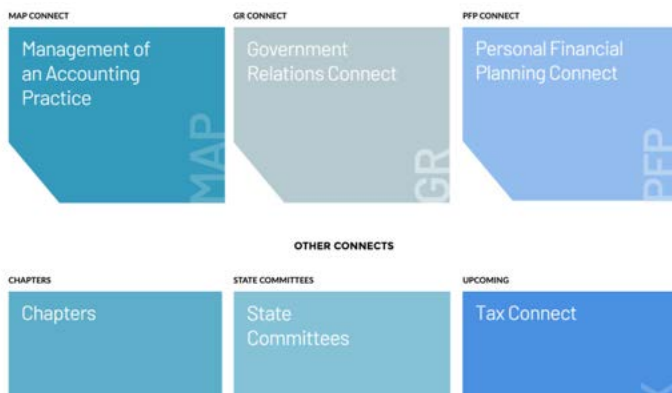
Then click Connect on the page that appears:



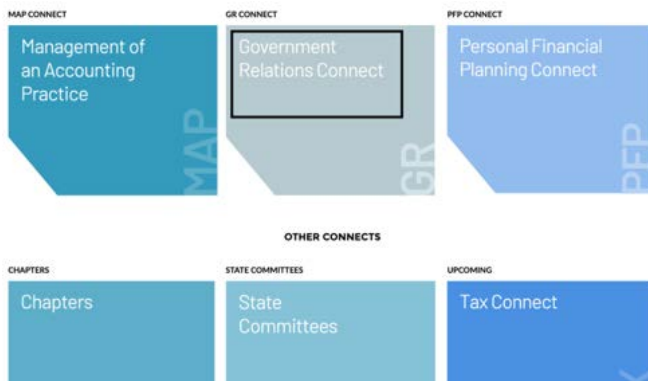
This will take you to the Connect homepage:



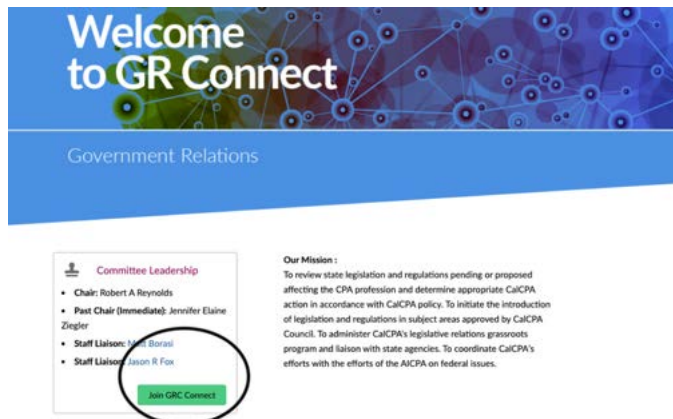
Scroll down the page and you'll see Connects you can join:



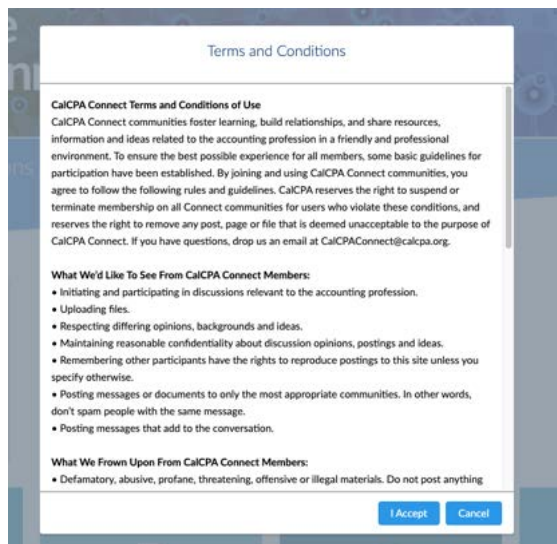
Select a Connect community you wish to join (in this case, Government Relations):



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:



Committee Leadership

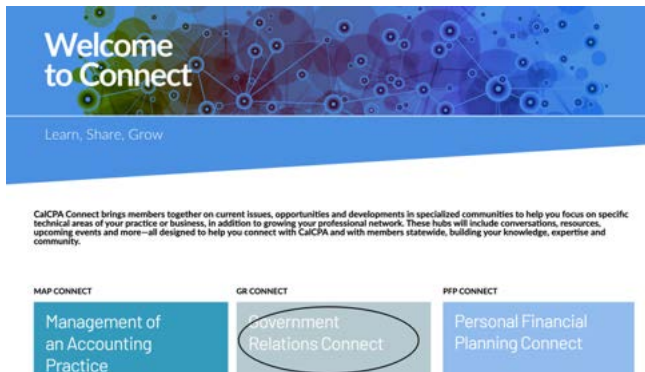
- **Chair:** Robert A Reynolds
- **Past Chair (Immediate):** Jennifer Elaine Ziegler
- **Staff Liaison:** Matt Borasi
- **Staff Liaison:** Jason R. Fox

[You're a Member. Unjoin](#)

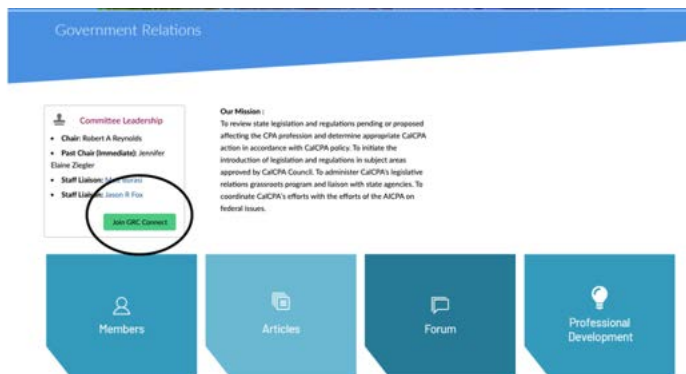
Our Mission:
To review state legislation and regulations pending or proposed affecting the CPA profession and determine appropriate CalCPA action in accordance with CalCPA policy. To initiate the introduction of legislation and regulations in subject areas approved by CalCPA Council. To administer CalCPA's legislative relations grassroots program and liaison with state agencies. To coordinate CalCPA's efforts with the efforts of the AICPA on federal issues.

How do I Post an Article?

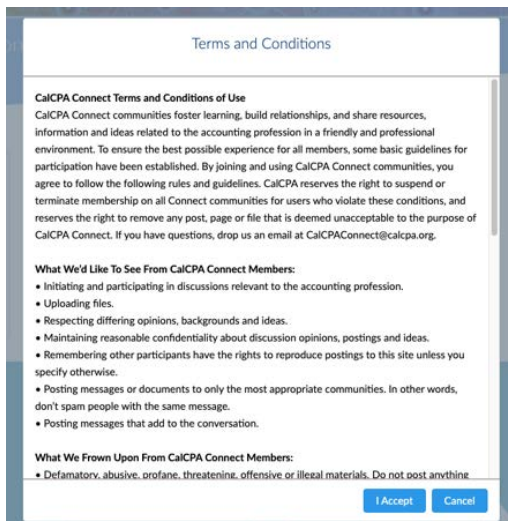
After logging in to the Connect homepage—<https://community.calcpa.org/>—find and click on the Connect community you wish to work with (in this example: Government Relations Connect):



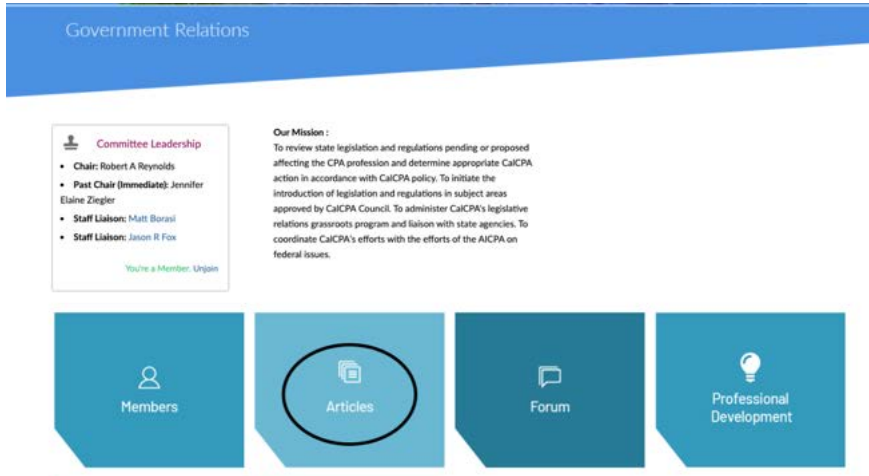
Select Join GRC Connect, if you are already not a member. (**Note:** You must be a member of a respective Connect community to experience full functionality.)



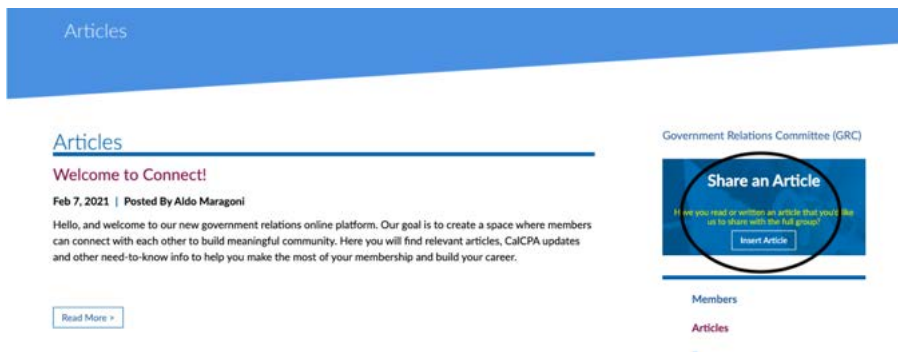
Read and click I Accept to the Terms & Conditions:



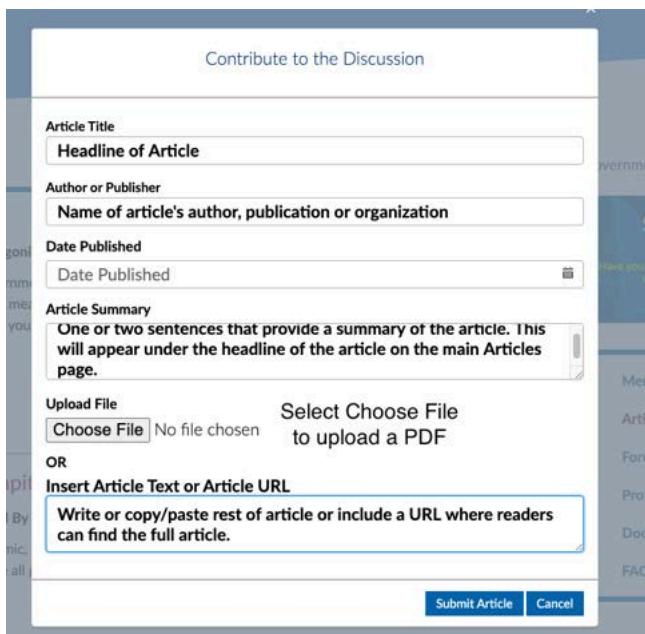
Select the Articles tile:



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?

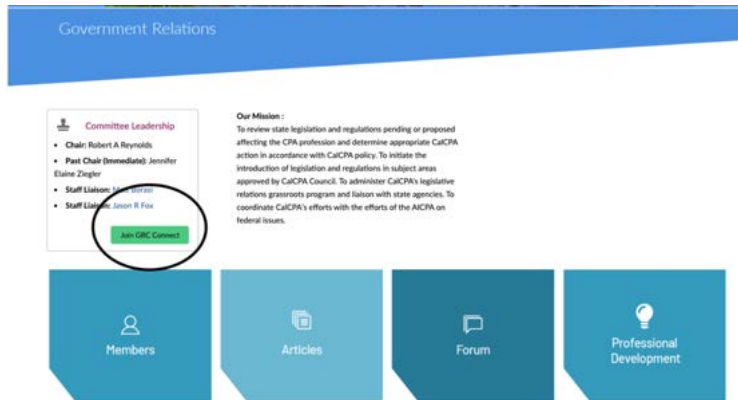
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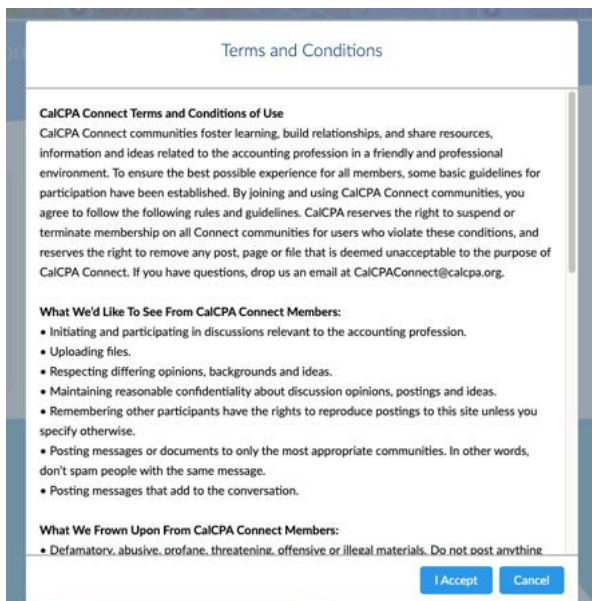
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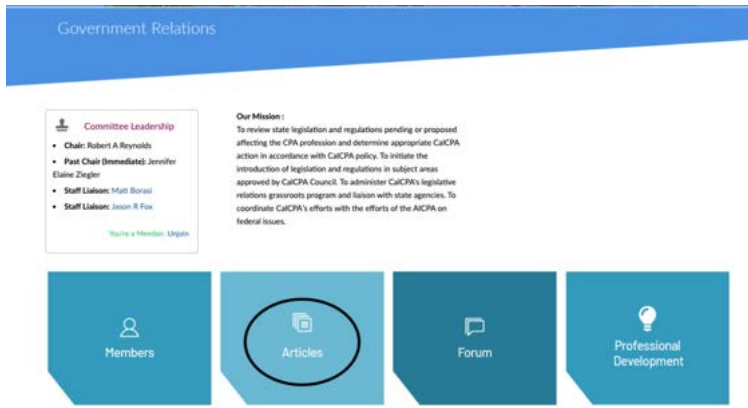
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Read and click I Accept to the Terms & Conditions:



Select Articles tile:



Click Read More to see the full article:

Articles

Welcome to Connect!

Feb 7, 2021 | Posted By Aldo Maragoni

Hello, and welcome to our new government relations online platform. Our goal is to create a space where members can connect with each other to build meaningful community. Here you will find relevant articles, CalCPA updates and other need-to-know info to help you make the most of your membership and build your career.

[Read More >](#)

2021: CPA Day at the Capitol Becomes CPA Week

Jan 28, 2021 | By CalCPA | Posted By Test User

With the lingering COVID-19 pandemic, our traditional CPA Day and in-person meetings with legislators are transitioning into something we have all grown accustomed to: Moving to a virtual format.

[Read More >](#)

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.

2021: CPA Day at the Capitol Becomes CPA Week

Jan 28, 2021 | By CalCPA | Posted By Test User

With the lingering COVID-19 pandemic, our traditional CPA Day and in-person meetings with legislators are transitioning into something we have all grown accustomed to: Moving to a virtual format. Using the Zoom skills many of us have sharpened over the last several months, we'll be holding video conferences with legislators and organizing meetings over a number of days: Jan. 25-Feb. 5. Our objectives are the same, however: Facilitate relationships with policy leaders and support a robust grassroots network to advance the public policy objectives of the profession. These relationships are the foundation to CalCPA's advocacy efforts and help set the tone for the year ahead. This is particularly important as we start the 2021-22 session with a new Legislature that will include a number of first-timers. For more information, please contact your chapter's program manager:

<https://www.calcpa.org/government-relations/cpa-day-at-the-capitol>

Post

B I U

To: 2021: CPA Day at the Capitol Becomes CPA Week

[Share](#)

How do I Start a Discussion?

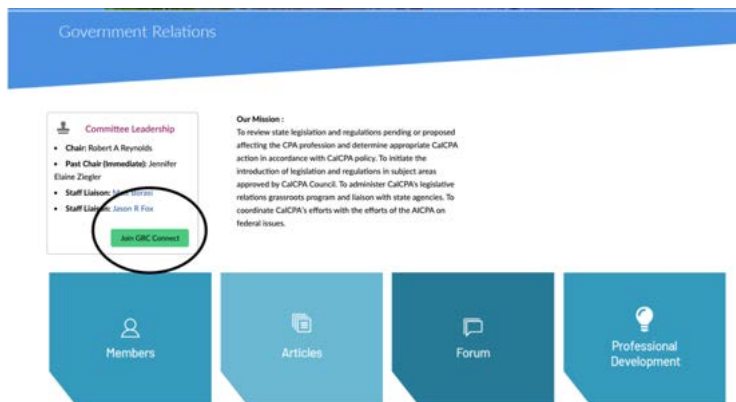
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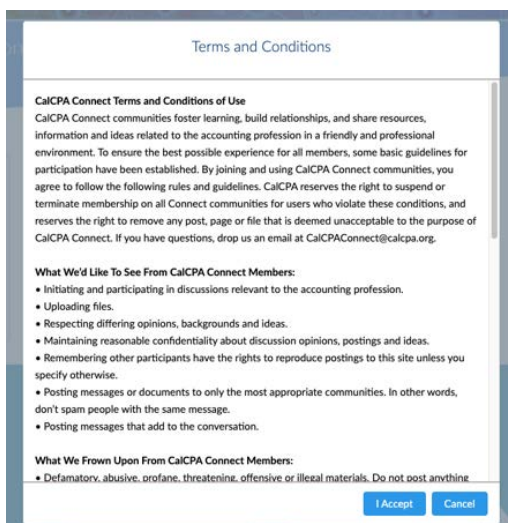
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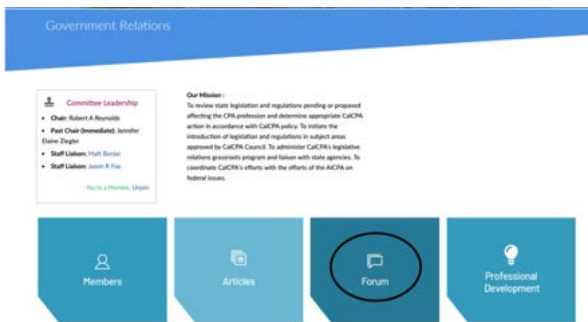
Select Join GRC Connect, if you are already not a member. (**Note:** You must be a member of a respective Connect community to experience full functionality.)



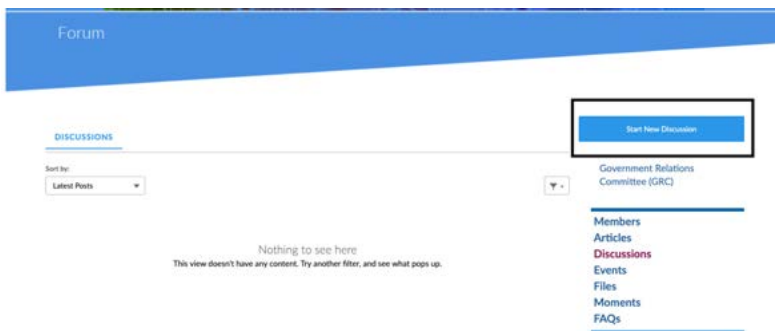
Read and click I Accept to the Terms & Conditions:



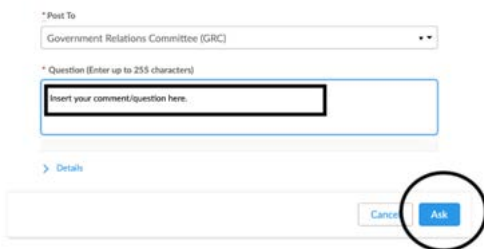
Select the Forum tile:



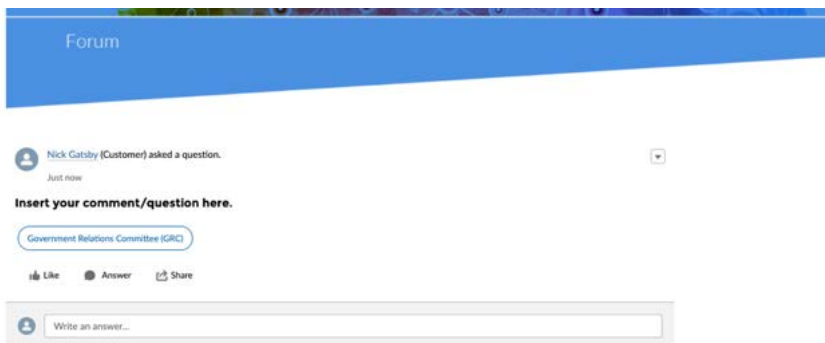
Select Start a Discussion:



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:

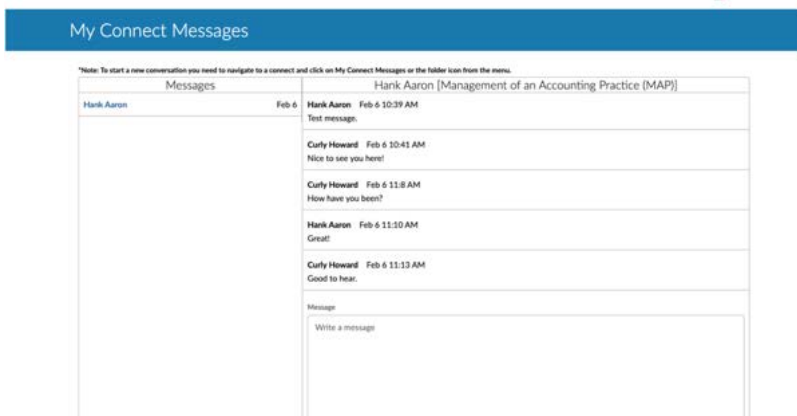


How do I Message Other Connect Members?

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:



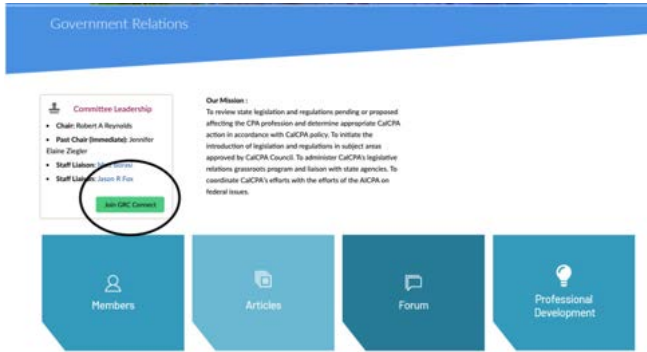
From here, you can respond to any messages you may have received by clicking on the sender's name in the left-hand box, inserting your comment in the Message box and click Send.

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.

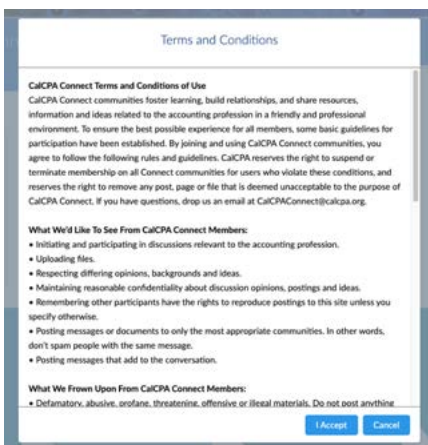
To see/create/send messages within a specific Connect, find and click on the Connect community you wish to work with (in this example: Government Relations Connect):



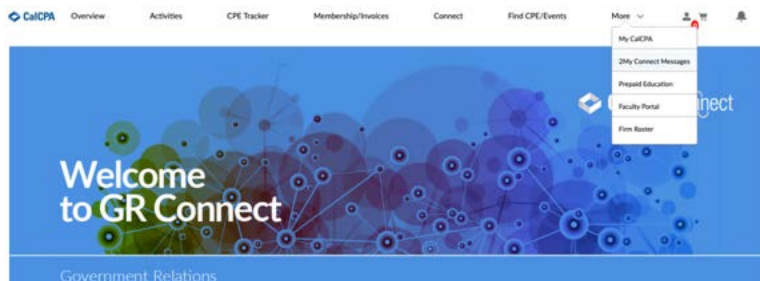
Select Join GRC Connect, if you are already not a member. (**Note:** You must be a member of a respective Connect community to experience full functionality, including messaging other members within a specific Connect community.)



Read and click I Accept to the Terms & Conditions:



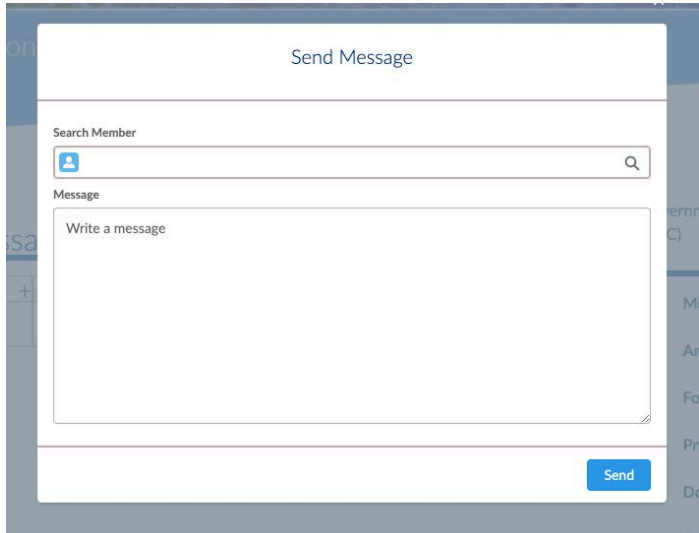
Select the envelope icon in top menu bar OR click on More in top menu bar and scroll to My Connect Messages in the drop-down:



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.



The image shows a 'Send Message' dialog box with a light blue header. Below the header is a 'Search Member' section containing a search input field with a magnifying glass icon. Underneath is a 'Message' section with a large text area containing the placeholder text 'Write a message'. At the bottom right of the dialog is a blue 'Send' button. The background of the application window is partially visible, showing a sidebar with icons and a list of items.

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)

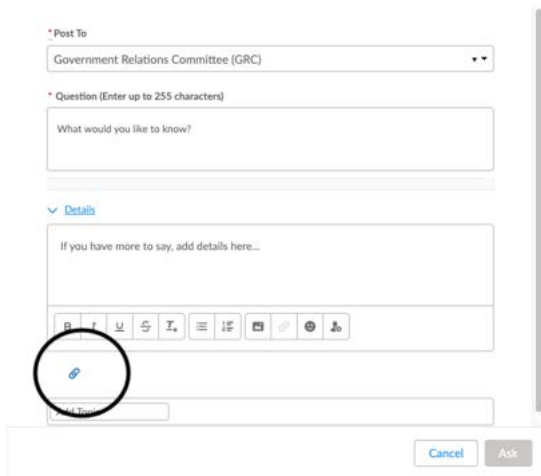
OR

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:

