

Subrecipient User Guide: San Luis Obispo County CA

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BENEVATE, INC.
DBA NEIGHBORLY SOFTWARE



Neighborly Software

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Accessing the Subrecipient Portal

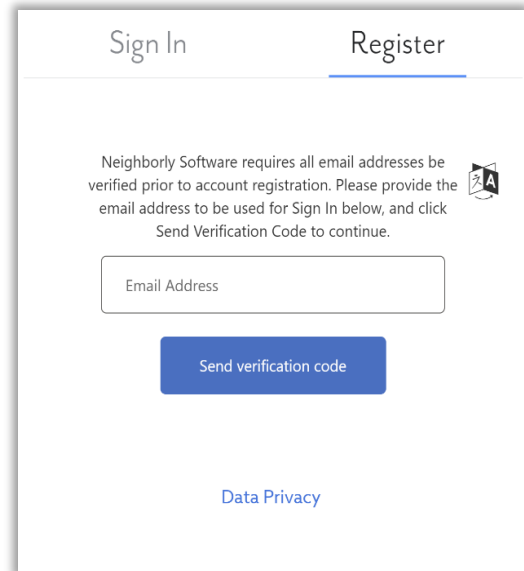
The Subrecipient Portal is hosted by Neighborly Software and is accessible available via any internet connected device. The recommended browser is Google Chrome but will work with any modern web browser.

Participant Portal Link: <https://portal.neighborlysoftware.com/WATERLOOIA/Participant>

Registration

To access the system, you'll need to create an account by first registering your email address. Select the Register tab and enter your work email address. Select "Send verification code". To verify your email address, the system will send you an email with a verification code.

Note: If you do not receive the email within 2 minutes, check your spam or junk mail folders. If the email is in either folder, mark the message as "Not Junk" or "Not Spam" to ensure you receive all future system notifications.



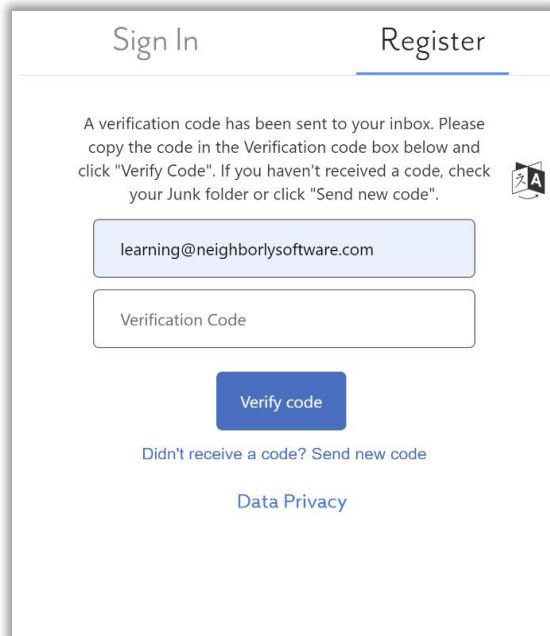
Sign In Register

Neighborly Software requires all email addresses be verified prior to account registration. Please provide the email address to be used for Sign In below, and click Send Verification Code to continue.

Email Address

Send verification code

Data Privacy



Sign In Register

A verification code has been sent to your inbox. Please copy the code in the Verification code box below and click "Verify Code". If you haven't received a code, check your Junk folder or click "Send new code".

learning@neighborlysoftware.com

Verification Code

Verify code

Didn't receive a code? Send new code

Data Privacy

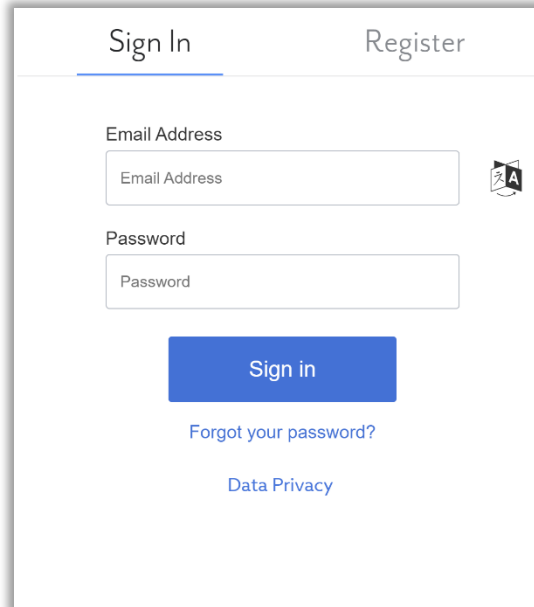
Enter the verification code into the text box and click "Verify Code."

If the code is not accepted, you may generate a new code by selecting "Send new code." Another email with a new code will be sent to your inbox.

After verifying your email address, you'll be prompted to create a password. Passwords should be at least 12 characters long and include at least one UPPERCASE letter, lowercase letter, a number, and a special character (!@#%\$^).

Signing In

Once your account has been registered, you may login (using the same link above) by entering the email address and password used during registration.



The screenshot shows the 'Sign In' page of the Neighborly Software interface. At the top, there are two tabs: 'Sign In' (which is selected and underlined) and 'Register'. Below the tabs, there are two input fields: 'Email Address' and 'Password'. The 'Email Address' field contains the placeholder text 'Email Address' and has a small icon to its right. The 'Password' field contains the placeholder text 'Password'. Below the input fields is a blue button labeled 'Sign in'. Underneath the button are two links: 'Forgot your password?' and 'Data Privacy'.

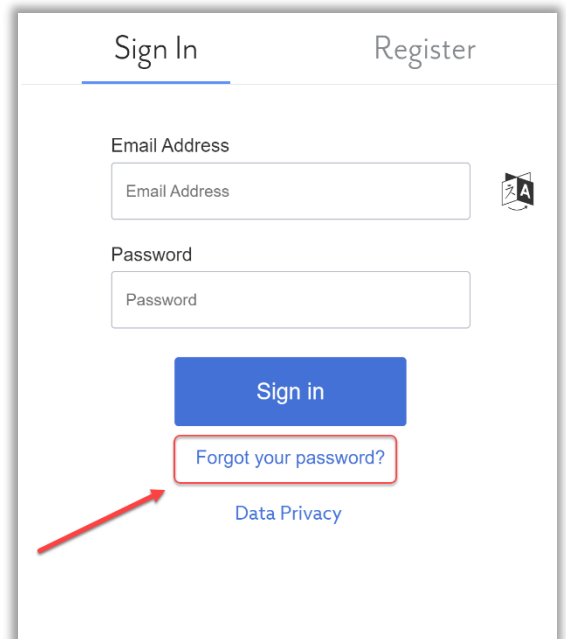
Password Reset

If you forget your password, select the link “Forgot your Password?” and follow the prompts to create a new password. Enter the email address that was used to register your account. Then select “Send Verification Code”

Within a few seconds, the system will send you an email containing a 6-digit code. Enter the code into the text field and select “Verify Code”


If after 2 minutes you have not received a code, you may repeat these steps to generate another code.

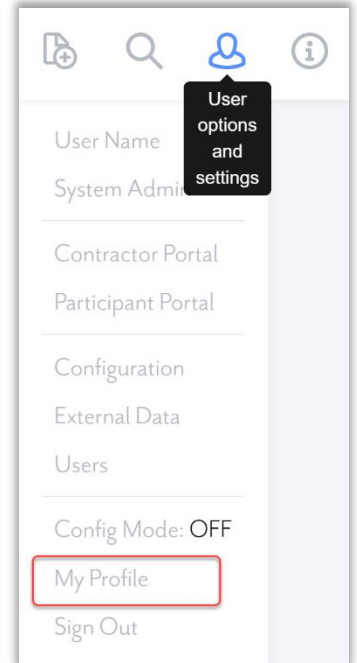
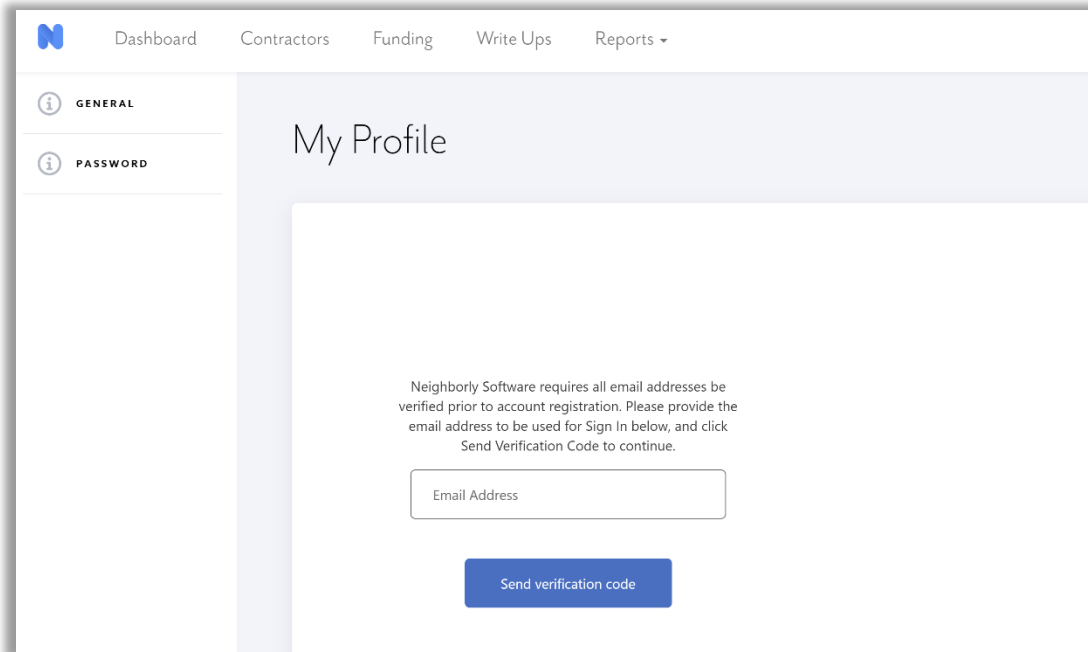
Be sure to check your spam and junk folders before requesting a new code. Sometimes users do not receive the code due to a simple typo when entering their email address. Verify that the email entered is indeed correct.



This screenshot is identical to the one above, showing the 'Sign In' page. However, the 'Forgot your password?' link is highlighted with a red rectangular box, and a red arrow points to it from the bottom left. The 'Sign in' button is also visible above the link.

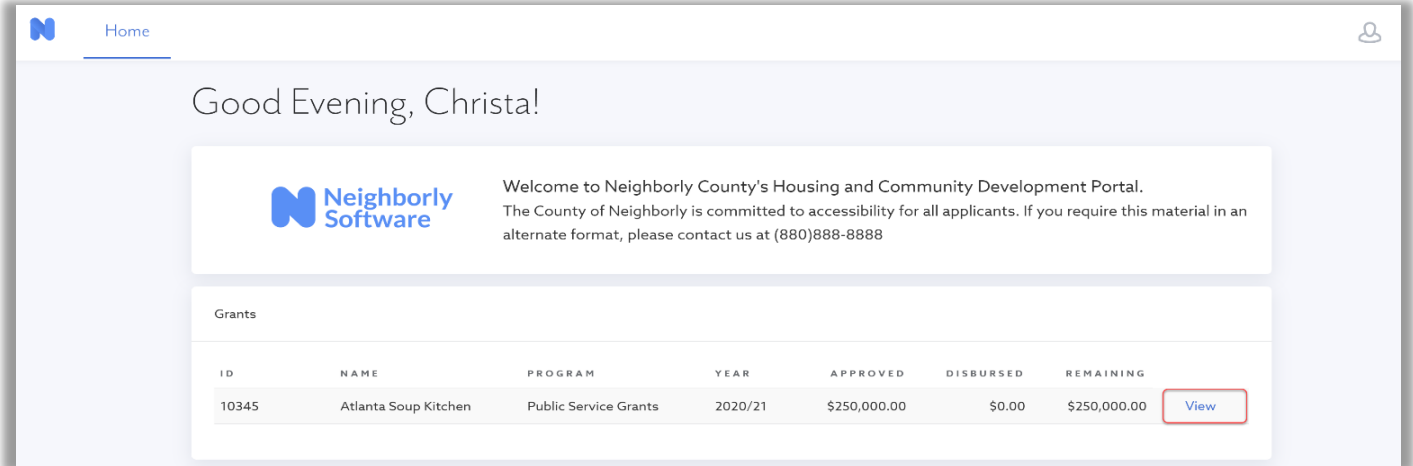
Changing your Password

To change your password, log into the Participant Portal. Select the  icon on the top right corner of the screen and select "My Profile". Next, select the "Password" option on the left side of the screen. For security purposes, you will be required to enter your email address, the system will then send you a verification code. Enter the code and follow the prompts to create a new password.



Managing your Grant Account

Upon logging in, the participant dashboard will become visible. Any case where funds have been awarded will be listed in the Grant card as shown below. To load the Grant Viewer, select “View” to load the grant account screen.

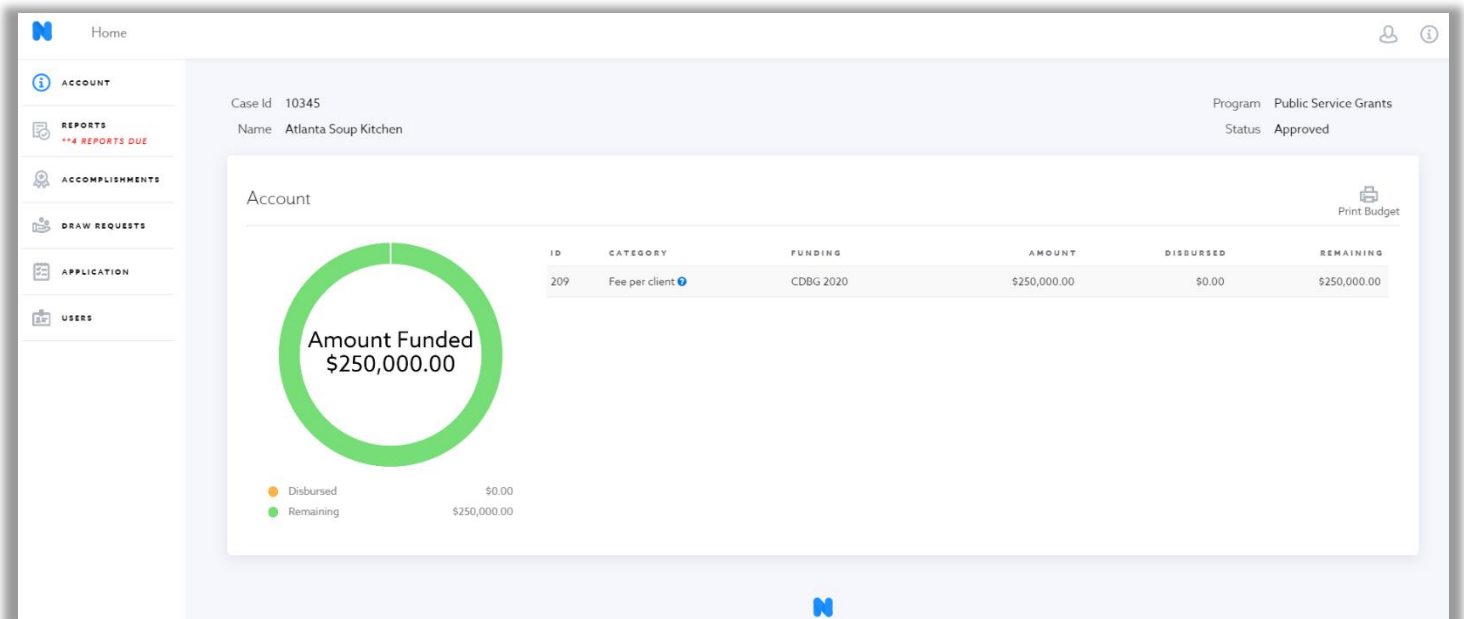


The dashboard shows a greeting "Good Evening, Christa!" and a welcome message from Neighborly Software. Below this is a "Grants" section with a table listing grant details. A "View" button is highlighted in red next to the first grant entry.

ID	NAME	PROGRAM	YEAR	APPROVED	DISBURSED	REMAINING	
10345	Atlanta Soup Kitchen	Public Service Grants	2020/21	\$250,000.00	\$0.00	\$250,000.00	View

Account

The Grant Viewer has 6 main sections: Account, Reports, Accomplishments, Draw Requests, Application and Documents. The Account screen is a summary of your Grant account, including the award amount, the funds disbursed, and the remaining account balance.

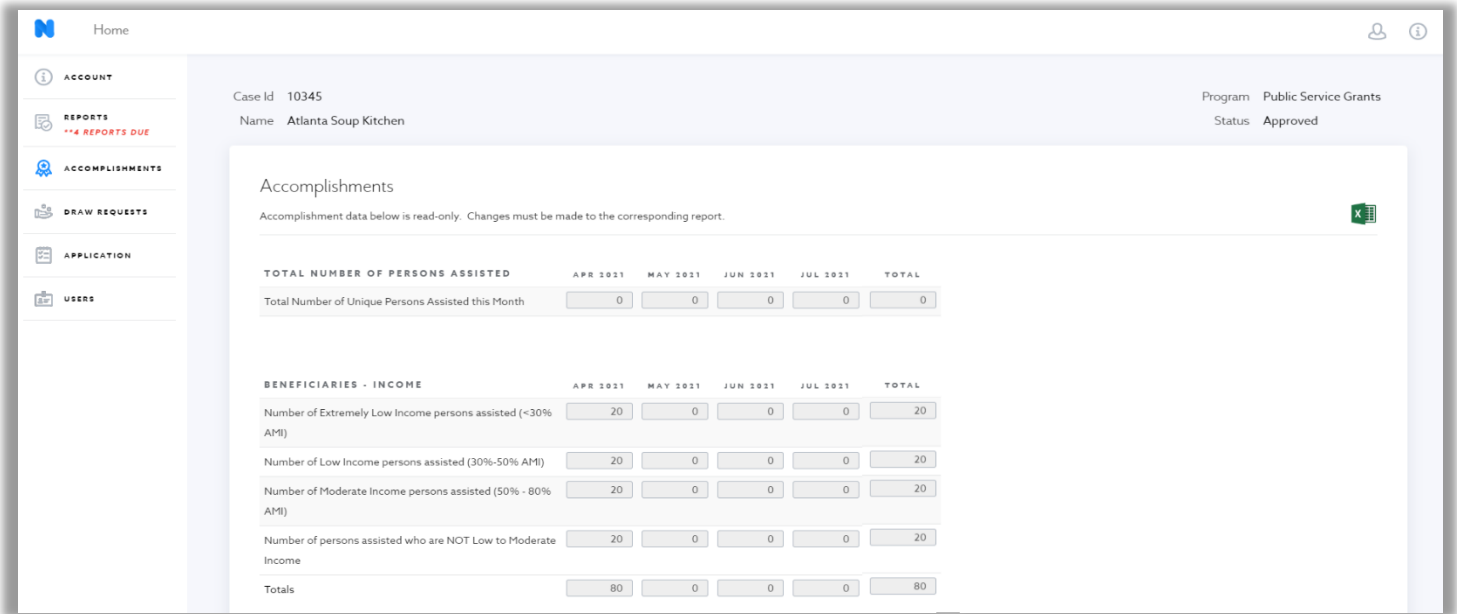


The Account screen displays a summary for Case ID 10345, Atlanta Soup Kitchen, with a Public Service Grants program and Approved status. A donut chart shows the funding breakdown: \$250,000.00 remaining (green) and \$0.00 disbursed (orange). A table below provides detailed funding information.

ID	CATEGORY	FUNDING	AMOUNT	DISBURSED	REMAINING
209	Fee per client	CDBG 2020	\$250,000.00	\$0.00	\$250,000.00

Accomplishments

The Accomplishments screen provides a summary of Accomplishment data entered via Scheduled Monthly and Annual Reports. Note that this screen is Read Only – accomplishment data can only be added/modified via the Monthly and Annual reports.





The screenshot shows the 'Accomplishments' screen for Case Id 10345, Atlanta Soup Kitchen. The program is Public Service Grants and the status is Approved. The screen displays a summary of accomplishment data for the month of April 2021.

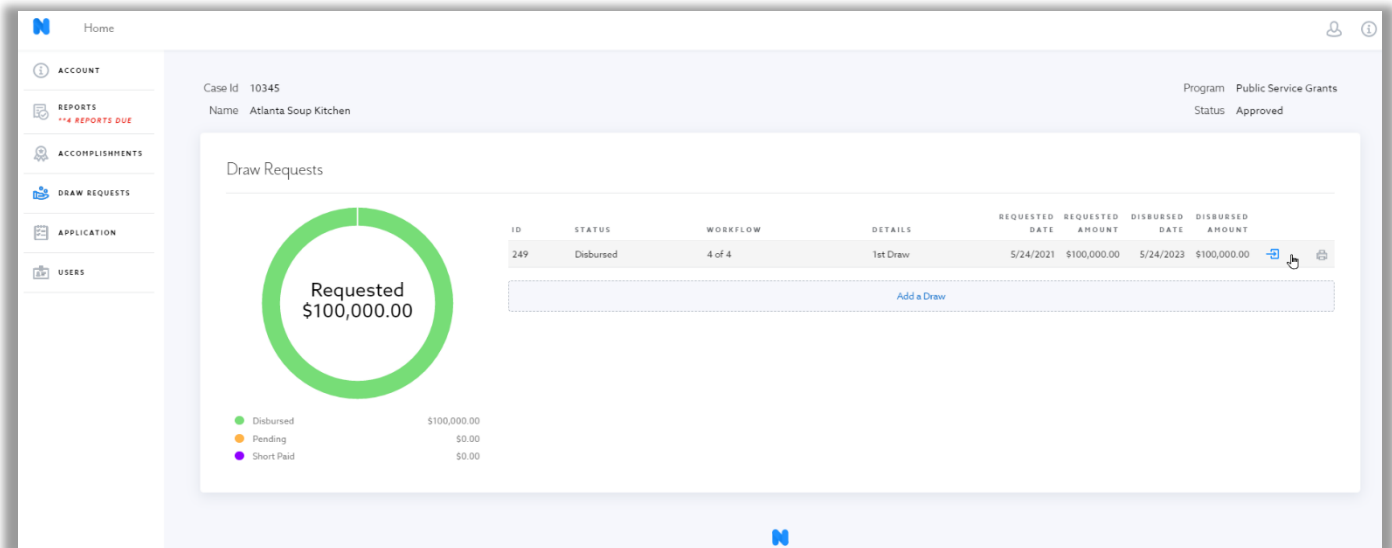
Accomplishments
Accomplishment data below is read-only. Changes must be made to the corresponding report.

TOTAL NUMBER OF PERSONS ASSISTED	APR 2021	MAY 2021	JUN 2021	JUL 2021	TOTAL
Total Number of Unique Persons Assisted this Month	0	0	0	0	0

BENEFICIARIES - INCOME	APR 2021	MAY 2021	JUN 2021	JUL 2021	TOTAL
Number of Extremely Low Income persons assisted (<30% AMI)	20	0	0	0	20
Number of Low Income persons assisted (30%-50% AMI)	20	0	0	0	20
Number of Moderate Income persons assisted (50% - 80% AMI)	20	0	0	0	20
Number of persons assisted who are NOT Low to Moderate Income	20	0	0	0	20
Totals	80	0	0	0	80

Draw Requests



The Draw Requests allows you to request draws from your remaining account balance. The initial screen is a summary of any existing draw requests and disbursement data. To view an existing draw, select the  icon to the right of the draw. To render a PDF of the Draw Voucher, select the  icon.



The screenshot shows the 'Draw Requests' screen for Case Id 10345, Atlanta Soup Kitchen. The program is Public Service Grants and the status is Approved. The screen displays a summary of draw requests and disbursement data.

Draw Requests

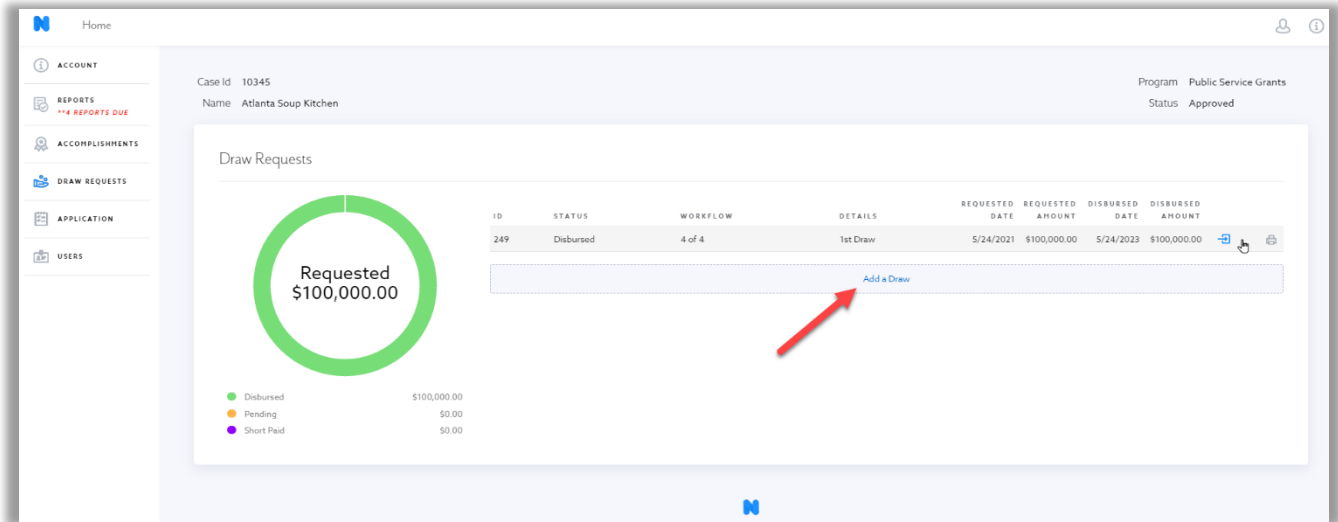
Requested \$100,000.00

ID	STATUS	WORKFLOW	DETAILS	REQUESTED DATE	REQUESTED AMOUNT	DISBURSED DATE	DISBURSED AMOUNT	
249	Disbursed	4 of 4	1st Draw	5/24/2021	\$100,000.00	5/24/2023	\$100,000.00	 

[Add a Draw](#)

- Disbursed \$100,000.00
- Pending \$0.00
- Short Paid \$0.00

Submitting a New Draw



The screenshot shows the 'Draw Requests' page for Case Id 10345, Atlanta Soup Kitchen. A donut chart indicates 'Requested \$100,000.00'. A table lists the draw details:

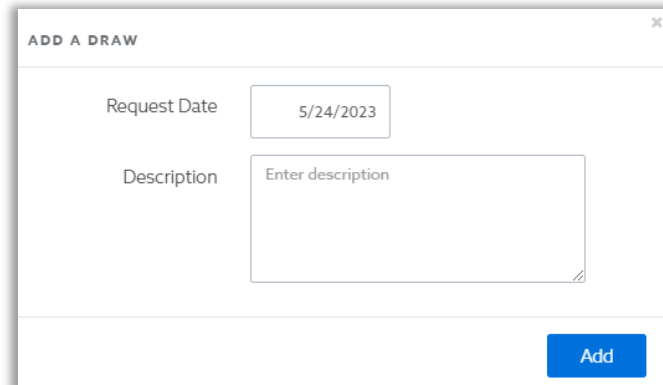
ID	STATUS	WORKFLOW	DETAILS	REQUESTED DATE	REQUESTED AMOUNT	DISBURSED DATE	DISBURSED AMOUNT
249	Disbursed	4 of 4	1st Draw	5/24/2021	\$100,000.00	5/24/2023	\$100,000.00

Below the table is an 'Add a Draw' button, which is highlighted by a red arrow.

To create a new draw, select the “Add a Draw” bar.

The system will default the “Request Date” to today’s date; however you will have the ability to update the date by clicking on the text box and using the date picker to select a new date.

Enter a description/summary of the draw. You will have the ability to update the details further on the next page.



The 'ADD A DRAW' form contains the following fields:

- Request Date: 5/24/2023
- Description: Enter description

An 'Add' button is located at the bottom right of the form.

Status	Not Submitted	Amount Requested	\$0.00
Date Requested	5/24/2023	Amount Approved	\$0.00

Request: Workflow 0 of 3*

****ACTION REQUIRED:** This draw request has NOT yet been submitted. In the form below, provide a summary of the draw request, enter the amount requested by category, upload any supporting documentation, and then click Submit.

DETAILS

Summary:

Period Start:

Period End:


DOCUMENTATION

This space is customizable for instructions on what to upload


[Upload File](#)

DETAILS	ORIGINAL AMOUNT	- OTHER DISBURSEMENTS	= AVAILABLE BALANCE	AMOUNT REQUESTED
Acquisition/General/Urgent Need	\$ 100,000.00	\$ 0.00	\$ 100,000.00	\$ 0.00
CDBG-DR Clockwork				
Totals	\$ 100,000.00	\$ 0.00	\$ 100,000.00	\$ 0.00


Once the draw has been created, you may update the summary and upload documents. In the “Details” portion of the page, you will then enter the funds requested from each of the budget categories listed. Once submitted, the draw request will be forwarded to a Program Administrator for review and approval. The draw will then be in a read-only mode where no further edits/changes can be made.

Draw Requests > Draw Id: 11 

Status	Not Submitted	Amount Requested	\$0.00
Date Requested	5/24/2023	Amount Approved	\$0.00

Request: Workflow 0 of 3* 

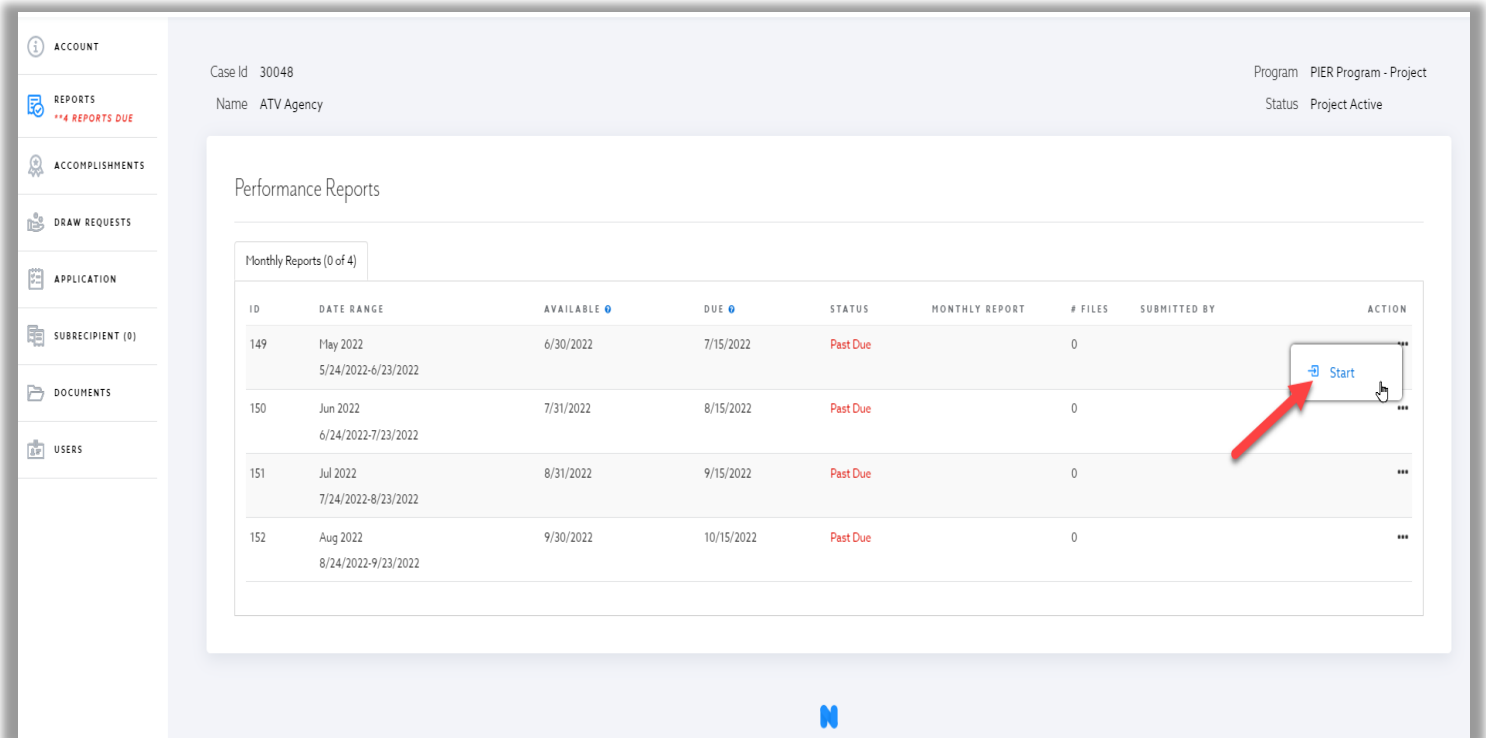
ACTIVITY	DATE COMPLETED	COMPLETED BY
Senior Financial Analyst Lead	Not yet approved	
PIER Contract Manager	Not yet approved	
Accounting	Not yet disbursed	

You may track the draw request review process by selecting the “Workflow” tab. You may also render a PDF of the Draw Request by selecting the  icon in the upper right.

Scheduled Reports

The Reports tab will indicate if any reports are Due or Past Due. Once you click into the Reports section, you will find all the reports that have been scheduled for your organization. Most often, these will be labeled as Monthly or Quarterly Reports.

To start a report, select the three-dot icon to the right of the report, and then select “Start”. Note that Reports are not available to be started/completed until the reporting period has passed.



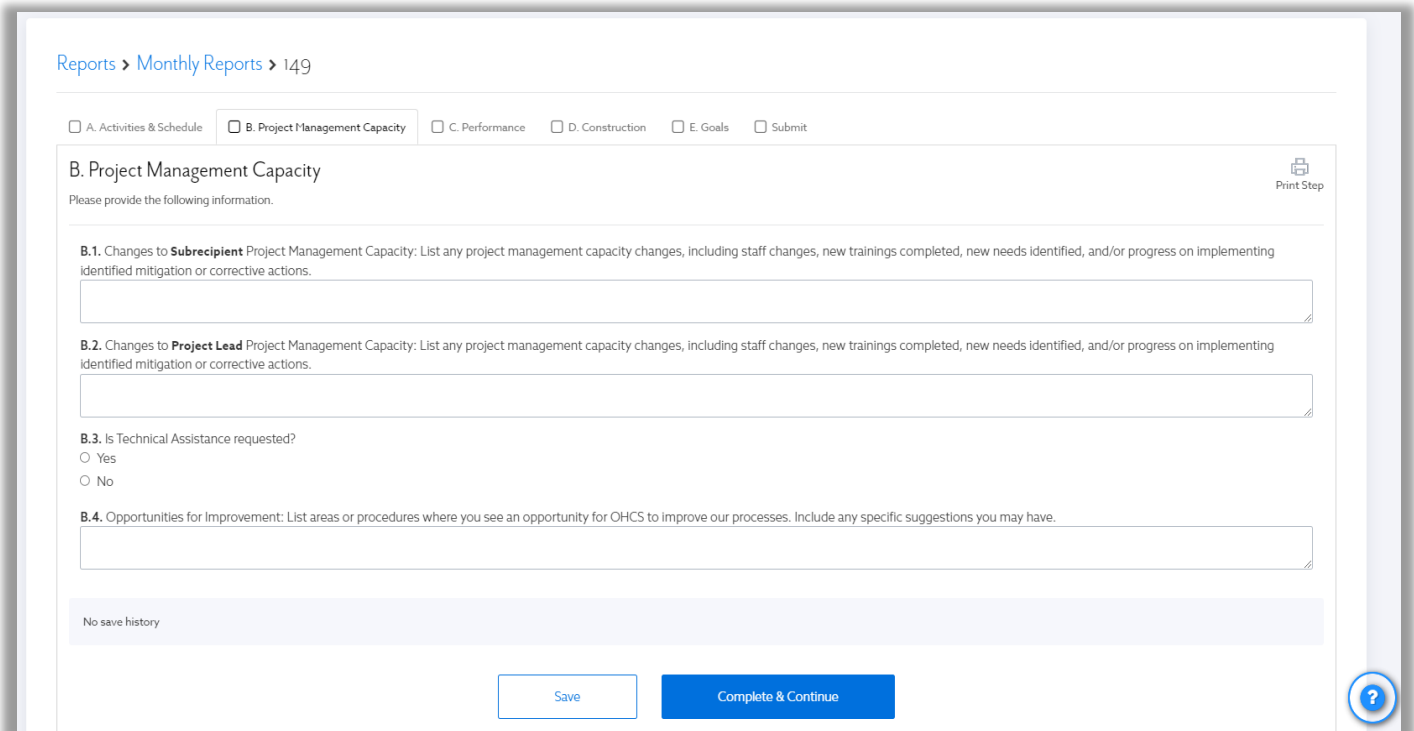
The screenshot displays the 'Performance Reports' section of the Neighborly Software interface. On the left is a navigation sidebar with options: ACCOUNT, REPORTS (with a red notification '4 REPORTS DUE'), ACCOMPLISHMENTS, DRAW REQUESTS, APPLICATION, SUBRECIPIENT (0), DOCUMENTS, and USERS. The main content area shows details for Case Id 30048 and Name ATV Agency, with Program PIER Program - Project and Status Project Active. Below this is a table of 'Monthly Reports (0 of 4)'. The table has columns for ID, DATE RANGE, AVAILABLE, DUE, STATUS, MONTHLY REPORT, # FILES, SUBMITTED BY, and ACTION. Four reports are listed, all with a status of 'Past Due'. A red arrow points to the 'Start' button in the ACTION column for report ID 149.

ID	DATE RANGE	AVAILABLE	DUE	STATUS	MONTHLY REPORT	# FILES	SUBMITTED BY	ACTION
149	May 2022 5/24/2022-6/23/2022	6/30/2022	7/15/2022	Past Due		0		Start
150	Jun 2022 6/24/2022-7/23/2022	7/31/2022	8/15/2022	Past Due		0		...
151	Jul 2022 7/24/2022-8/23/2022	8/31/2022	9/15/2022	Past Due		0		...
152	Aug 2022 8/24/2022-9/23/2022	9/30/2022	10/15/2022	Past Due		0		...

Once inside a report, you will see multiple tabs depending on your grant program. Usually there are at least 3 tabs – one for reporting Goal progress, one for Accomplishment data and one to certify and Submit the report.

Complete each tab by clicking the “Complete and Continue” button at the bottom of the screen. You may also Save your work to return to the report later.

Steps can be reopened by selecting the “Reopen” button at the bottom of the page. The report is not Complete and Submitted until all tabs are individually marked Complete. Once the report has been fully completed and submitted it will no longer be available for any further edits or changes unless reopened by a Program



Reports > Monthly Reports > 149

A. Activities & Schedule B. Project Management Capacity C. Performance D. Construction E. Goals Submit

B. Project Management Capacity Print Step

Please provide the following information.


B.1. Changes to **Subrecipient Project Management Capacity:** List any project management capacity changes, including staff changes, new trainings completed, new needs identified, and/or progress on implementing identified mitigation or corrective actions.

B.2. Changes to **Project Lead Project Management Capacity:** List any project management capacity changes, including staff changes, new trainings completed, new needs identified, and/or progress on implementing identified mitigation or corrective actions.


B.3. Is Technical Assistance requested?
 Yes
 No

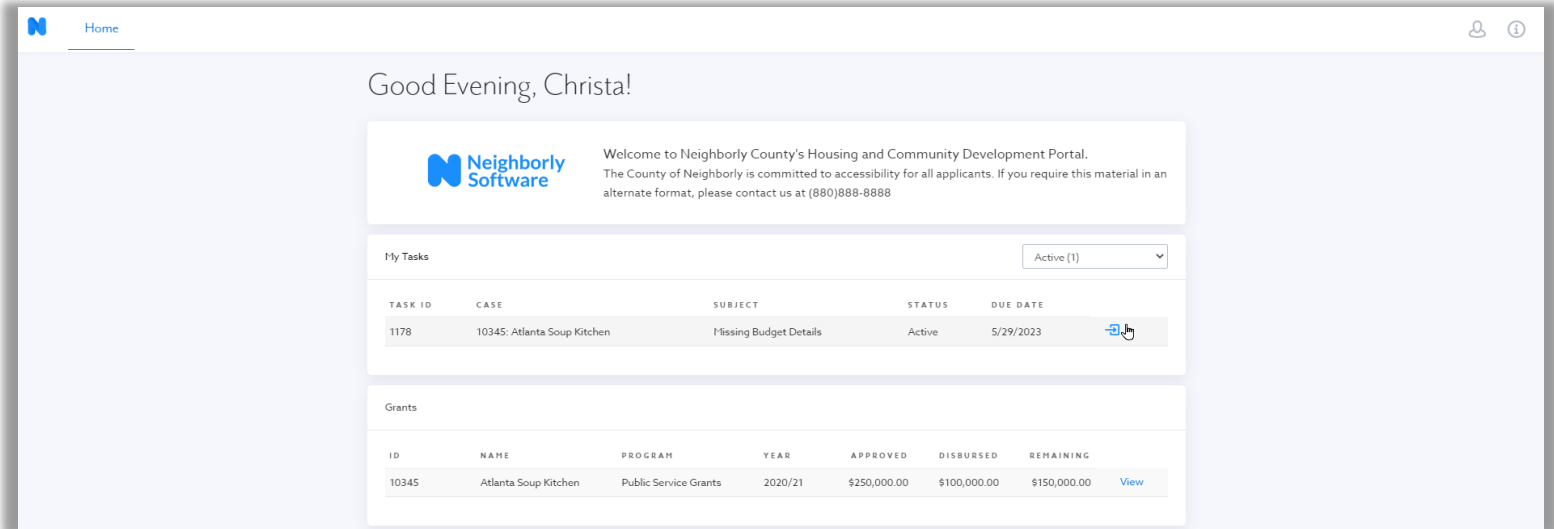
B.4. Opportunities for Improvement: List areas or procedures where you see an opportunity for OHCS to improve our processes. Include any specific suggestions you may have.

No save history



Tasks

You may be assigned a task by a Program Administrator. Tasks will be displayed on the Portal Dashboard. To open a task, select the  to the right of the task.




Home User Profile Info

Good Evening, Christa!

Welcome to Neighborly County's Housing and Community Development Portal. The County of Neighborly is committed to accessibility for all applicants. If you require this material in an alternate format, please contact us at (880)888-8888

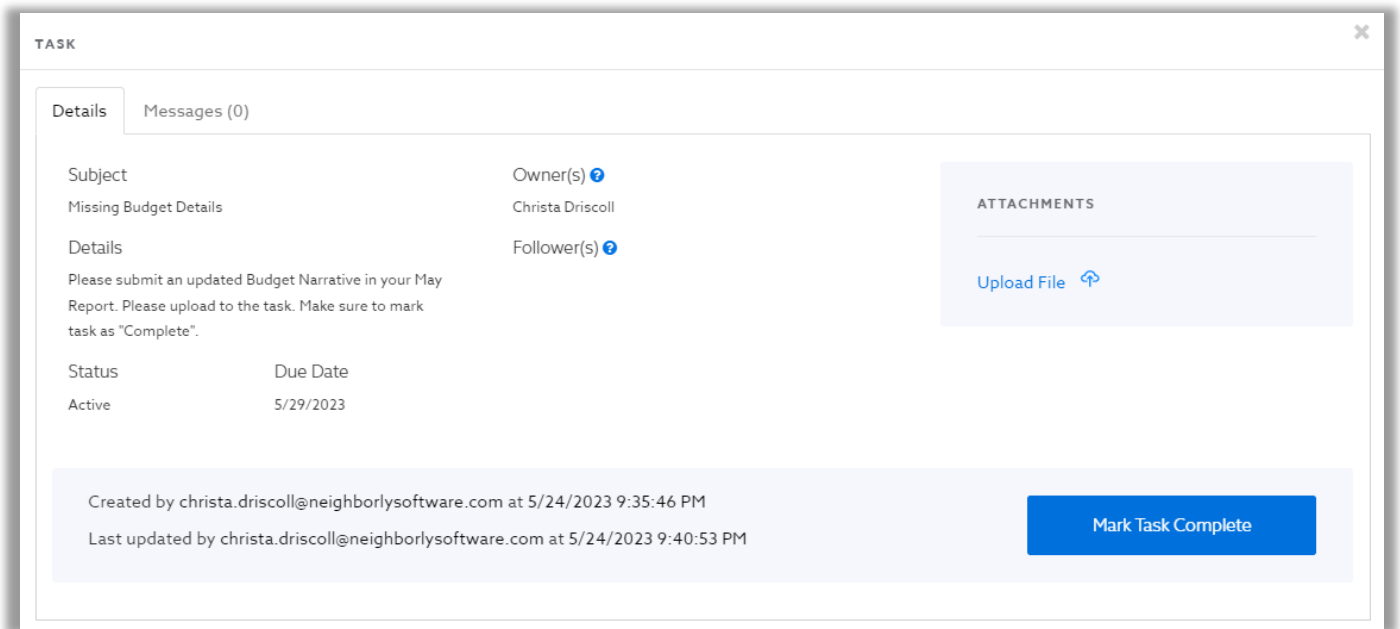
My Tasks Active (1)

TASK ID	CASE	SUBJECT	STATUS	DUE DATE	
1178	10345: Atlanta Soup Kitchen	Missing Budget Details	Active	5/29/2023	

Grants

ID	NAME	PROGRAM	YEAR	APPROVED	DISBURSED	REMAINING	
10345	Atlanta Soup Kitchen	Public Service Grants	2020/21	\$250,000.00	\$100,000.00	\$150,000.00	View

Once inside the task, view the details and complete the request. You may upload any supporting files by selecting the "Upload File" hyperlink.



TASK Close

Details Messages (0)

Subject: Missing Budget Details

Owner(s): Christa Driscoll

Details: Please submit an updated Budget Narrative in your May Report. Please upload to the task. Make sure to mark task as "Complete".

Follower(s):


Status: Active Due Date: 5/29/2023

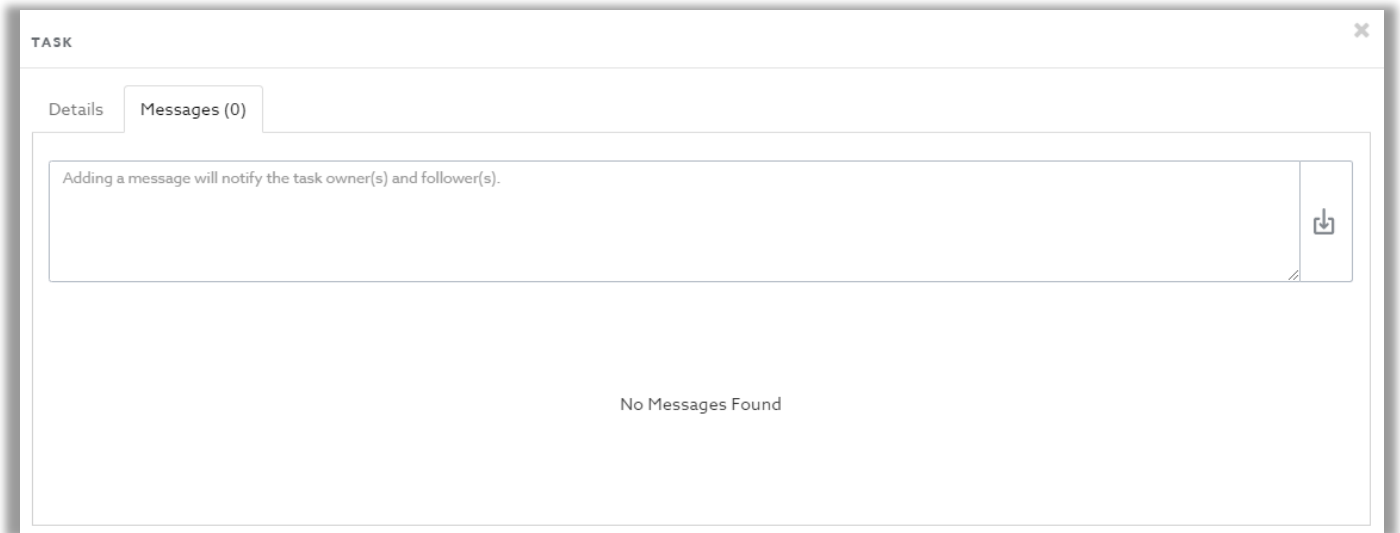
Attachments: [Upload File](#)

Created by christa.driscoll@neighborlysoftware.com at 5/24/2023 9:35:46 PM

Last updated by christa.driscoll@neighborlysoftware.com at 5/24/2023 9:40:53 PM

[Mark Task Complete](#)

Additionally, if there are follow up questions regarding the task, you may send a message in the task to the Program Administrator who originally assigned the task. Select the Messages Tab, enter a detailed message in the text area, then select the  icon to post the message. You will be notified via email once a response has been posted. Once the task has been completed, select the “Mark Task Complete” button.



Technical Difficulties

If at any point you run into technical difficulties with the software, use the help icon located in the bottom right corner of your screen to contact our Support Team. Support is available Monday – Friday from 8am to 7pm Eastern Time.

