

Neighborly Software

Subrecipient User Guide

This Presentation Will Cover:

Accessing the Subrecipient Portal

- Registering your Account

- Logging In

- Signing Out

- Forgot your Password

- Changing your Password

Managing your Grant account

- Submitting a Draw Request

- Completing Monthly/Quarterly/Annual Reports

- Live Demo

Accessing the Subrecipient Portal

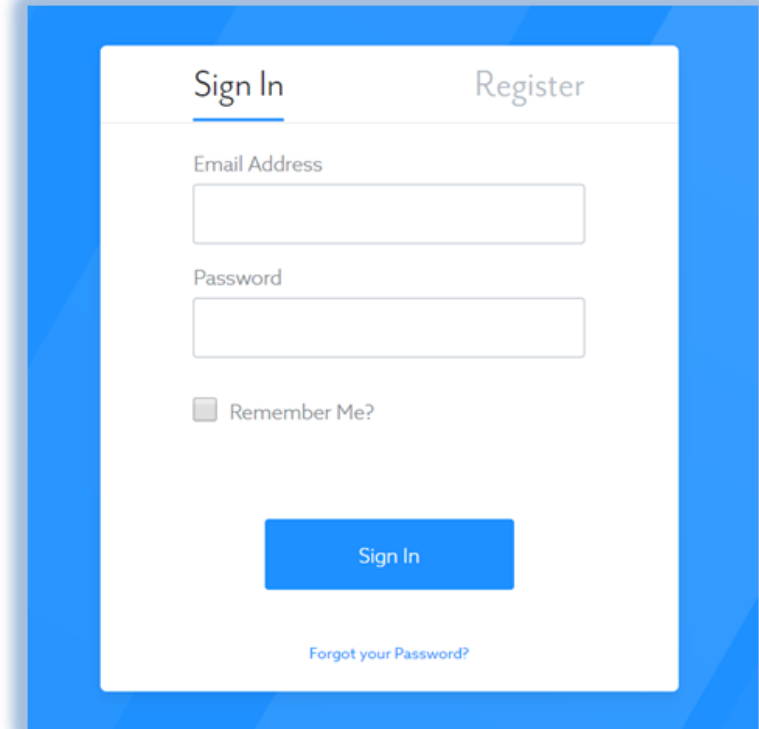
*Accessing the Portal, Registering your Account, Log-in
Information, Password Help*

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 (i.e. Internet Explorer v10+, FireFox, Safari).

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



The screenshot shows a web form with a blue border. At the top, there are two tabs: "Sign In" (which is underlined) and "Register". Below the tabs, there are two input fields: "Email Address" and "Password". Below the "Password" field, there is a checkbox labeled "Remember Me?". At the bottom of the form, there is a blue button labeled "Sign In" and a link labeled "Forgot your Password?".

Registering your Account

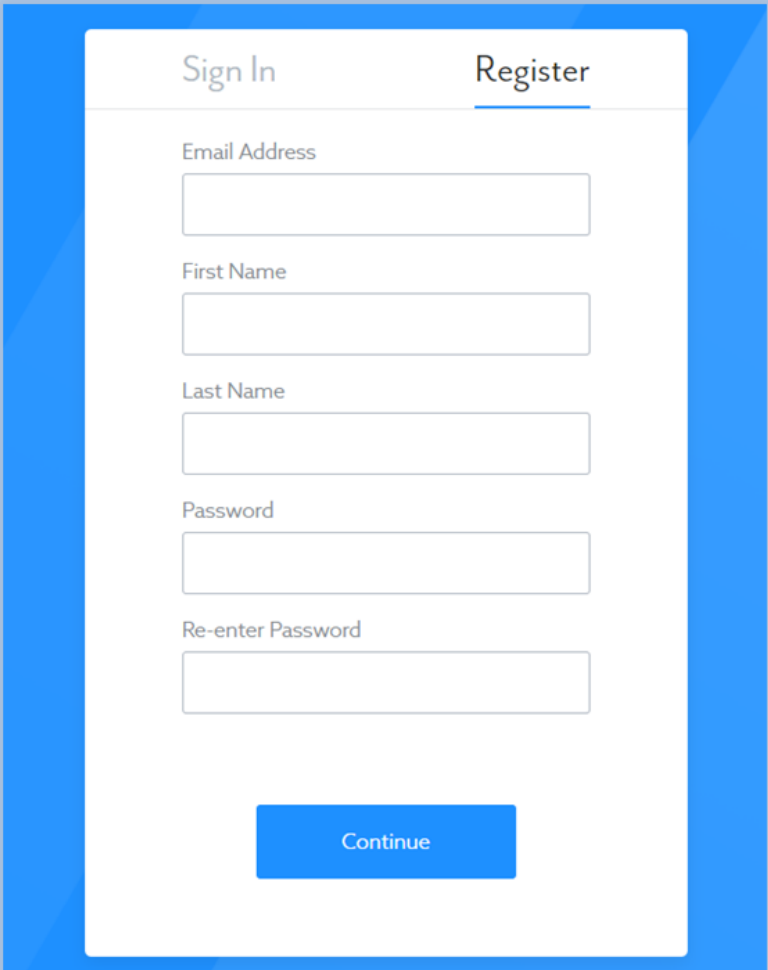
When you access the Portal for the first time:

- Register your account by clicking on the Register link.
- The registration process will create a user name (your work email address) and password that will be used for future logins.

The email address you choose will also be used for system emails/notifications.

- The system will validate that you own the registered email address by sending an email with a validation link.

Note: If you do not receive the system email within 2 minutes, check your spam or bulk mail folder. If the email appears in that folder, you should right click on the email to indicate “Not Junk” or “Not Spam” to ensure you receive any other system notifications.




The image shows a registration form interface with a blue border. At the top, there are two tabs: "Sign In" and "Register", with "Register" being the active tab. Below the tabs, there are five input fields: "Email Address", "First Name", "Last Name", "Password", and "Re-enter Password". Each field is a simple rectangular box. At the bottom of the form, there is a blue button labeled "Continue".

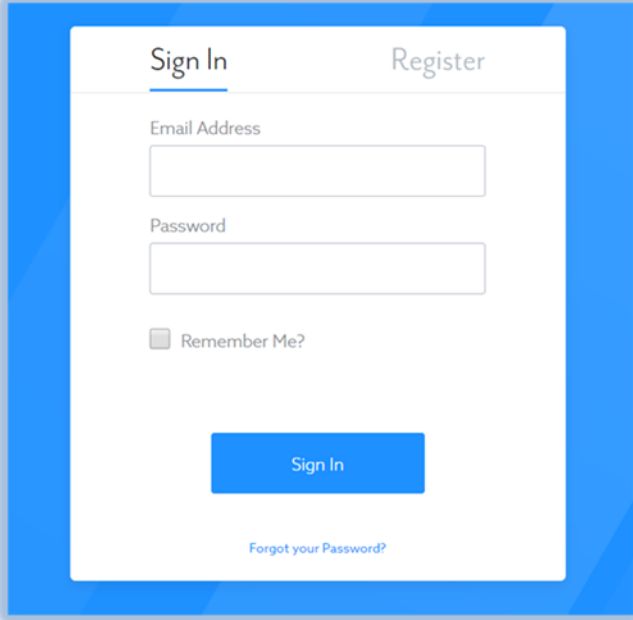
Logging In

Once your account has been registered, you may login by entering the email address and password used during registration.

By checking “Remember Me?”, your web browser will remember your email address for future logins (depending on browser and security settings).

Signing Out

To sign out (aka log out) of the system, click on the  icon on the top right corner of the screen and select “Sign Out”.



The image shows a login form with a blue border. At the top, there are two tabs: "Sign In" (which is underlined) and "Register". Below the tabs, there are two input fields: "Email Address" and "Password". Below the "Password" field, there is a checkbox labeled "Remember Me?". At the bottom of the form, there is a blue button labeled "Sign In". Below the button, there is a link that says "Forgot your Password?".


Forgot your Password

If you forget your password, click on the link that says “Forgot your Password?” and follow the prompts to create a new password.

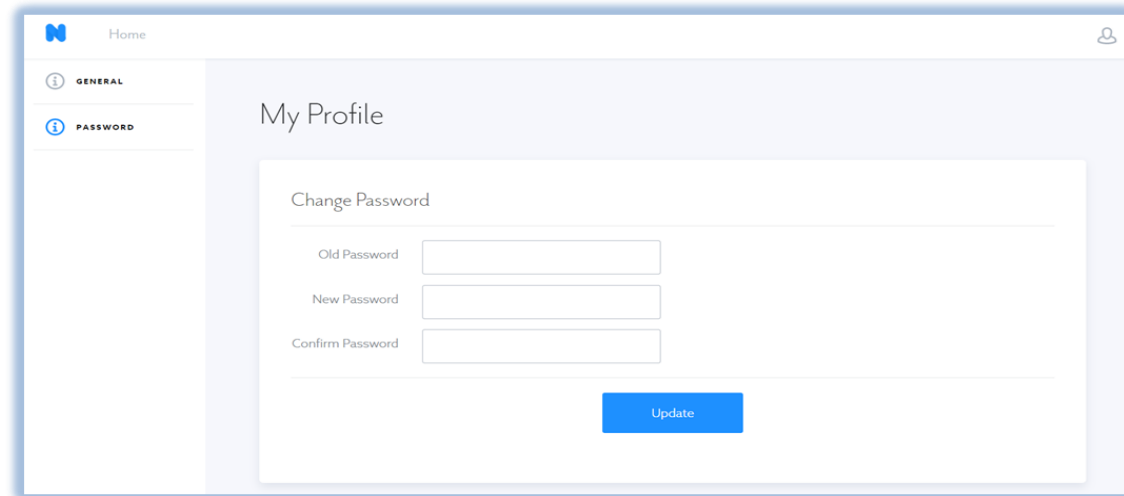
For security purposes, the system will send an email to the registered email address with a link to reset your password.

Changing your Password

To change your password, log into the Application Portal.

Click on the  icon on the top right corner of the screen, and select “My Profile”.

Then select the Password option on the left side of the screen. For security purposes, you will be required to enter your Old Password before selecting a New Password.



The screenshot shows the 'My Profile' page in the Application Portal. The page has a header with a blue logo and the word 'Home'. On the right side of the header is a user profile icon. Below the header is a navigation menu with two options: 'GENERAL' and 'PASSWORD'. The 'PASSWORD' option is selected and highlighted. The main content area is titled 'My Profile' and contains a 'Change Password' form. The form has three input fields: 'Old Password', 'New Password', and 'Confirm Password'. Below the input fields is a blue 'Update' button.

Managing your Grant account

Viewing & Understanding your Grant account, and Reviewing your Accomplishments

The screenshot shows a web application interface. At the top left, there is a blue 'N' logo and the word 'Home'. At the top right, there is a user profile icon. Below the header, a large grey banner contains the text 'Good Morning, Chris!'. Underneath the banner is a white box with the text 'Welcome to the Augusta Housing and Community Development Application Portal.'. Below this is a section titled 'Grants' which contains a table with the following data:

ID	NAME	PROGRAM	APPROVED	DISBURSED	REMAINING	
10127	XYZ Non-Profit	CDBG Grants	\$10,000.00	\$0.00	\$10,000.00	View

Viewing your Grant Account

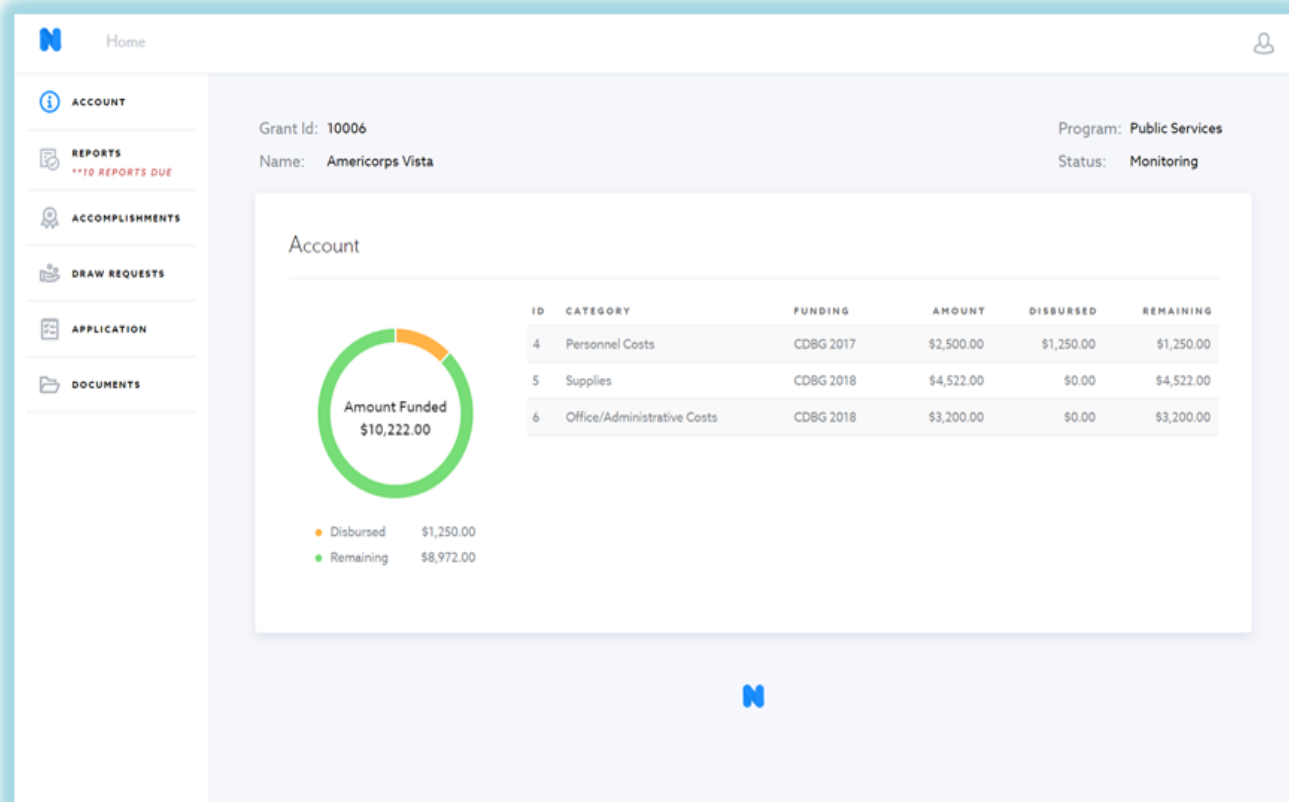
Upon logging in, you should see your grant account listed in the table of Grants.

Click “View” to load the grant account screen.

Understanding your Grant Account

The Grant account screen has 6 tabs:

- Account
- Reports
- Accomplishments
- Draw Requests
- Application
- Documents



Reviewing your Accomplishments

The Accomplishments screen:

- Provides a summary of Accomplishment data entered via Monthly and Annual Reports.
- Is **Read Only** – accomplishment data can only be added/modified via the Monthly and Annual reports.

The scroll bar at the bottom of each section of Accomplishments is used to view multiple months.

Home

ACCOUNT

REPORTS
**10 REPORTS DUE

ACCOMPLISHMENTS

DRAW REQUESTS

APPLICATION

DOCUMENTS

Grant Id: 10006

Name: Americorps Vista

Program: Public Services

Status: Monitoring

Accomplishments

This tab is read-only. To make changes to Accomplishments, you must update the appropriate Report.

TOTAL NUMBER OF PERSONS ASSISTED	AUG 2017	SEP 2017	OCT 2017	NOV 2017	DEC 2017	JAN 2018	FEB
Total Number of Unique Persons Assisted this Month	20	6					


BENEFICIARIES - INCOME	AUG 2017	SEP 2017	OCT 2017	NOV 2017	DEC 2017	JAN 2018	FEB
Number of Extremely Low Income persons assisted (<30% AMI)	5	3		2	5	0	
Number of Low Income persons assisted (30%-50% AMI)	5	2		1	5	0	
Number of Moderate Income persons assisted (50% - 80% AMI)	5	1		0	5	0	
Number of persons assisted who are NOT Low to Moderate Income	5			0	0	0	
Totals	20	6	0	3	15	0	

Submitting a Draw Request

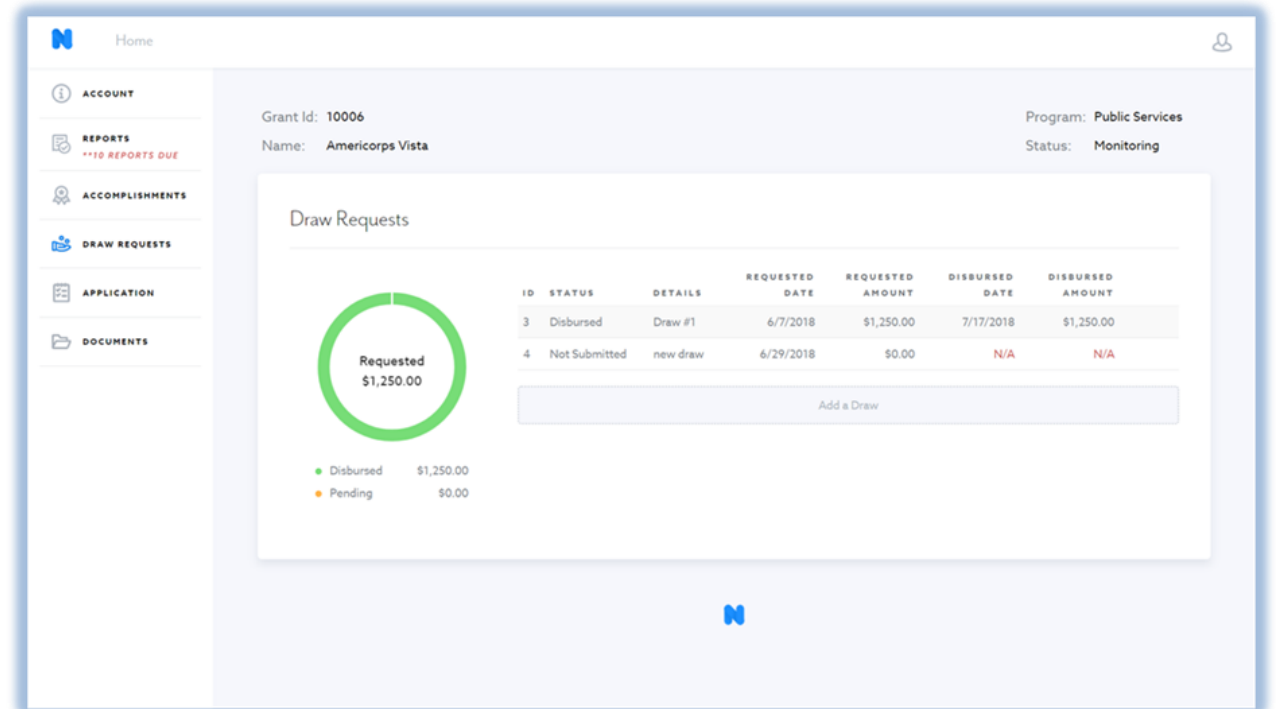
Viewing, Creating, and Requesting a Draw

Viewing & Creating a Draw

The Draw Requests allows you to request draws from your remaining account balance.

To view an existing draw, click on the  icon to the right of the draw.

To create a new draw, click the “Add a Draw” link.



The screenshot displays the 'Draw Requests' interface for Grant ID: 10006, Name: Americorps Vista, Program: Public Services, and Status: Monitoring. The interface includes a sidebar with navigation options: ACCOUNT, REPORTS (with 10 reports due), ACCOMPLISHMENTS, DRAW REQUESTS, APPLICATION, and DOCUMENTS. The main content area features a 'Draw Requests' section with a donut chart showing 'Requested \$1,250.00' and a table of draw requests. A legend indicates 'Disbursed \$1,250.00' and 'Pending \$0.00'. An 'Add a Draw' button is located below the table.

ID	STATUS	DETAILS	REQUESTED DATE	REQUESTED AMOUNT	DISBURSED DATE	DISBURSED AMOUNT
3	Disbursed	Draw #1	6/7/2018	\$1,250.00	7/17/2018	\$1,250.00
4	Not Submitted	new draw	6/29/2018	\$0.00	N/A	N/A

The initial screen is a summary of any existing draw requests and disbursement data.

Requesting a Draw

When requesting a draw:

- Provide a brief description of the draw request,
- Input the amount requested by budget “Category,”
- Attach any supporting documents as necessary.

The draw request will be forwarded to the City for review and approval/denial.

CATEGORY	ORIGINAL AMOUNT	OTHER DISBURSEMENTS	AVAILABLE BALANCE	AMOUNT REQUESTED
Personnel Costs CD8G 2017	\$ 2,500.00	\$ 1,250.00	\$ 2,500.00	\$ 0.00
Supplies CD8G 2018	\$ 4,522.00	\$ 0.00	\$ 4,522.00	\$ 0.00
Office/Administrative Costs CD8G 2018	\$ 3,200.00	\$ 0.00	\$ 3,200.00	\$ 0.00
Totals	\$ 10,222.00	\$ 1,250.00	\$ 8,972.00	\$ 0.00

You can track the draw request review process by clicking on the “Workflow” tab.

Completing Monthly/Quarterly/Annual Reports


Accessing & Completing Reports

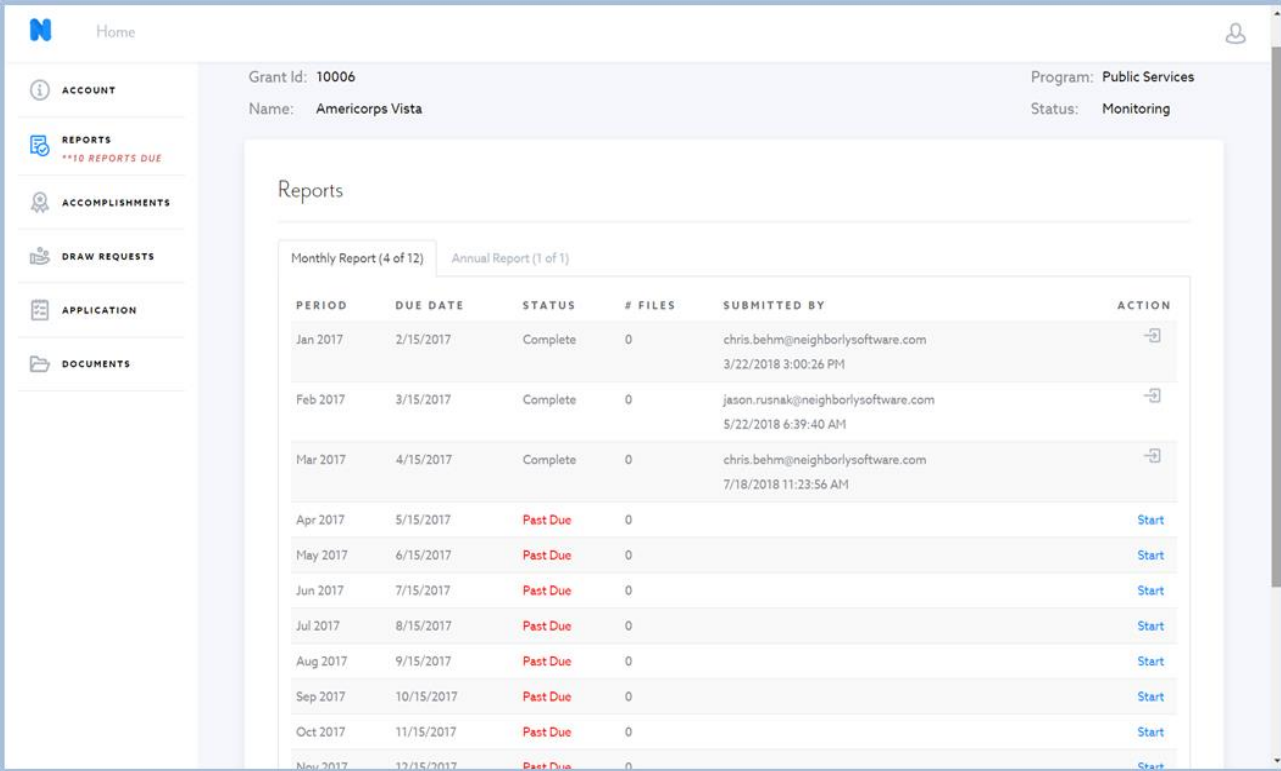
The Reports Tab




The Reports tab will indicate if any reports are Due or Past Due.

Once you click into the Reports section, you'll see a summary of reports, including tabs for Monthly, Quarterly and/or Annual Reports.

Accessing a Report

Click into a report by clicking the  icon to the right of the report, or start a new report by clicking the "Start" link.



PERIOD	DUE DATE	STATUS	# FILES	SUBMITTED BY	ACTION
Jan 2017	2/15/2017	Complete	0	chris.behm@neighborlysoftware.com 3/22/2018 3:00:26 PM	
Feb 2017	3/15/2017	Complete	0	jason.rusnak@neighborlysoftware.com 5/22/2018 6:39:40 AM	
Mar 2017	4/15/2017	Complete	0	chris.behm@neighborlysoftware.com 7/18/2018 11:23:56 AM	
Apr 2017	5/15/2017	Past Due	0		Start
May 2017	6/15/2017	Past Due	0		Start
Jun 2017	7/15/2017	Past Due	0		Start
Jul 2017	8/15/2017	Past Due	0		Start
Aug 2017	9/15/2017	Past Due	0		Start
Sep 2017	10/15/2017	Past Due	0		Start
Oct 2017	11/15/2017	Past Due	0		Start
Nov 2017	12/15/2017	Past Due	0		Start

Note: Reports are not available to be started/completed until the reporting period has passed.

Completing a Report

Once inside a report, you will see multiple tabs depending on your grant program.

- one for reporting Goal progress,
- one for Accomplishment data
- one to certify and Submit.

Complete each tab by clicking the “Complete and Continue” link at the bottom of the screen.

- There is an option to save your work and return at a later date.

The report is not Complete and Submitted until all tabs are individually marked Complete.

Home

Grant Id: 10006 Program: Public Services
Name: AmeriCorps Vista Status: Monitoring

Reports

Monthly Report (4 of 12) Annual Report (1 of 1)

PERIOD	DUE DATE	STATUS	# FILES	SUBMITTED BY	ACTION
Jan 2017	2/15/2017	Complete	0	chris.behm@neighborlysoftware.com 3/22/2018 3:00:26 PM	Start
Feb 2017	3/15/2017	Complete	0	jason.rusnak@neighborlysoftware.com 5/22/2018 6:39:40 AM	Start
Mar 2017	4/15/2017	Complete	0	chris.behm@neighborlysoftware.com 7/18/2018 11:23:56 AM	Start
Apr 2017	5/15/2017	Past Due	0		Start
May 2017	6/15/2017	Past Due	0		Start
Jun 2017	7/15/2017	Past Due	0		Start
Jul 2017	8/15/2017	Past Due	0		Start
Aug 2017	9/15/2017	Past Due	0		Start
Sep 2017	10/15/2017	Past Due	0		Start
Oct 2017	11/15/2017	Past Due	0		Start
Nov 2017	12/15/2017	Past Due	0		Start

Live Demo

Program Contacts

Tina Roseberry

*Housing and Community Development
Administrator*

croseberry@Bethlehem-pa.gov

(610) 997-5731

Shawn Fuller

*Grant Management
Specialist*

sfuller@Bethlehem-pa.gov

(610) 419-1447

Next Steps

- Register your Neighborly Account
- Access your 2021 Grant Submission
- Sign 2021 Grant Contract
- Submit reports and draw requests through Neighborly

Q&A