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
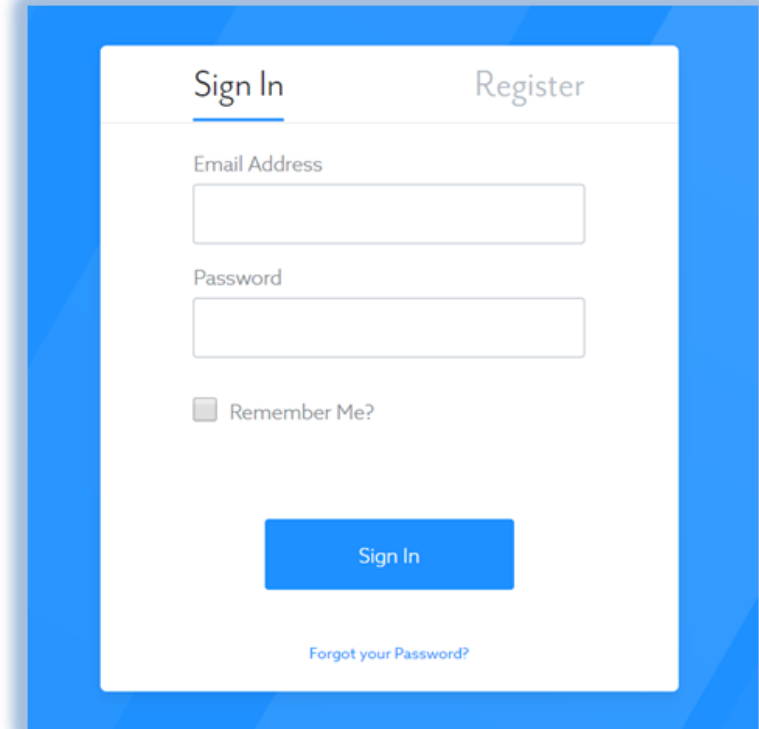
Accessing the Subrecipient Portal

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
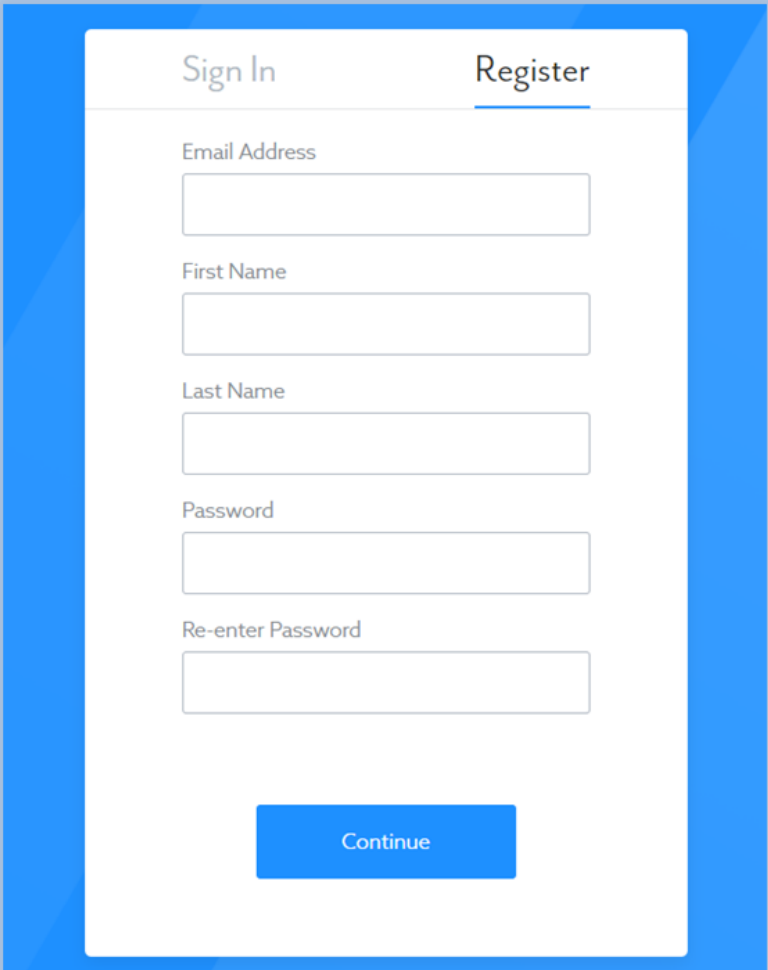
Registering your Account

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.
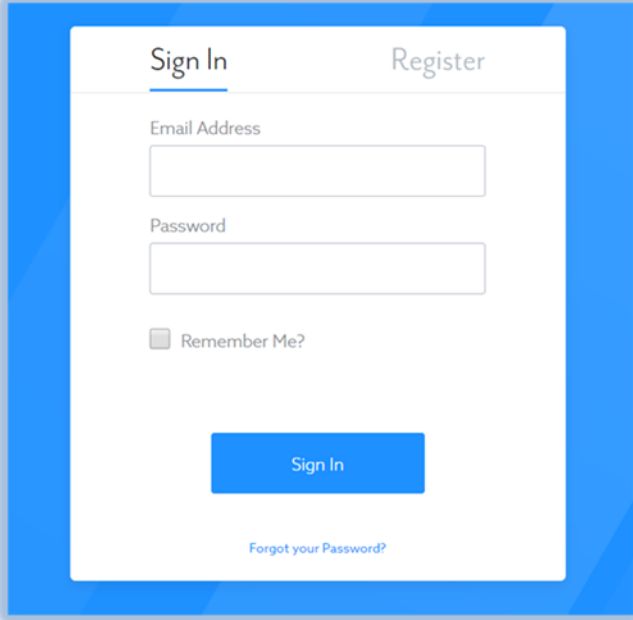
Logging In

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".

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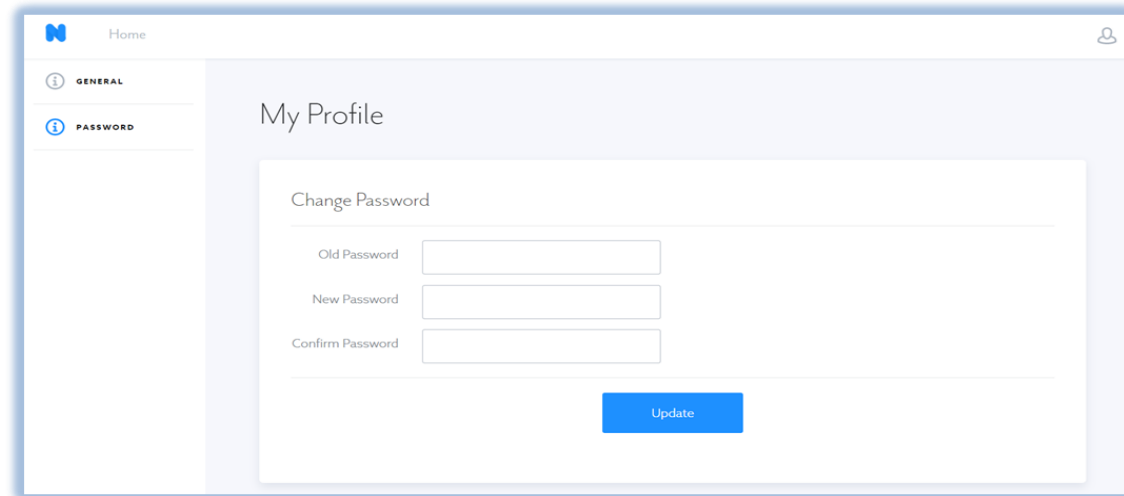
For security purposes, the system will send an email to the registered email address with a link to reset your password.

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.

Managing your Grant account

Viewing & Understanding your Grant account, and Reviewing your Accomplishments
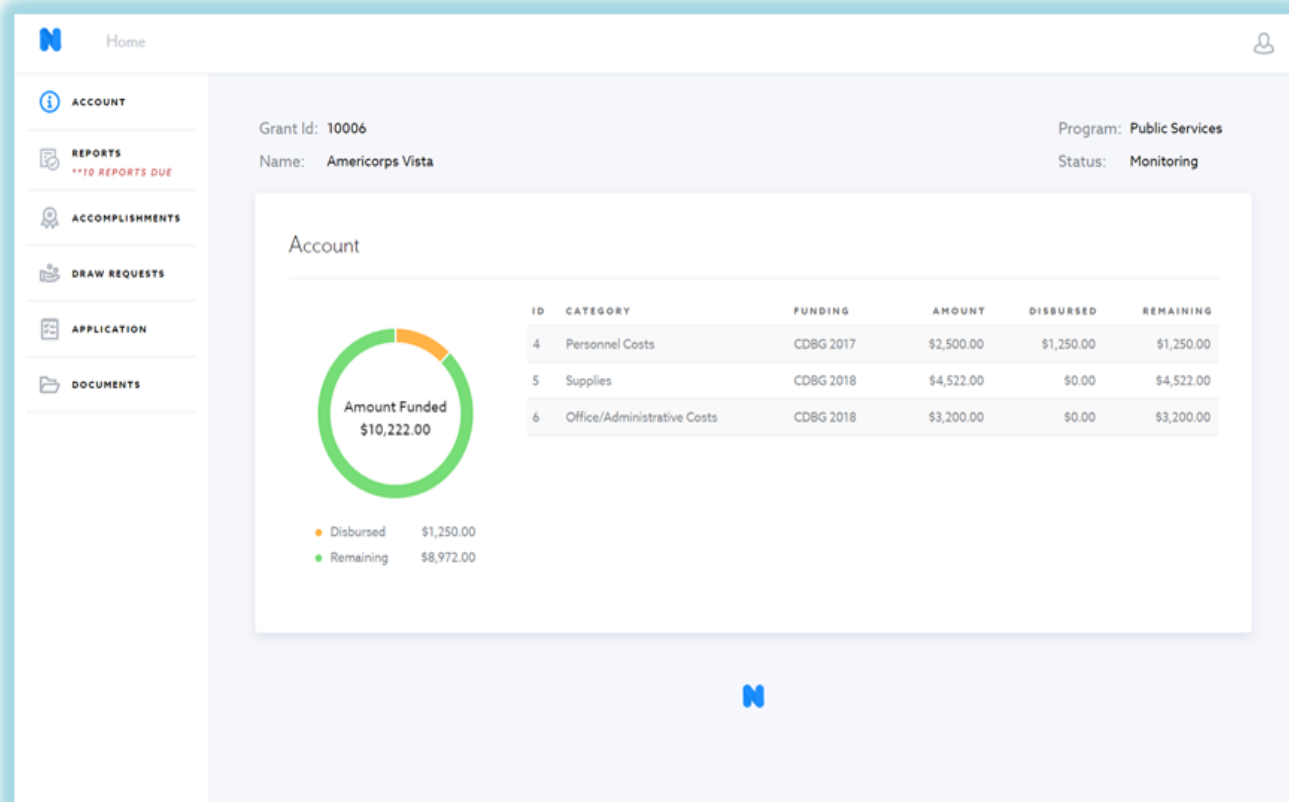
Viewing your Grant Account

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.

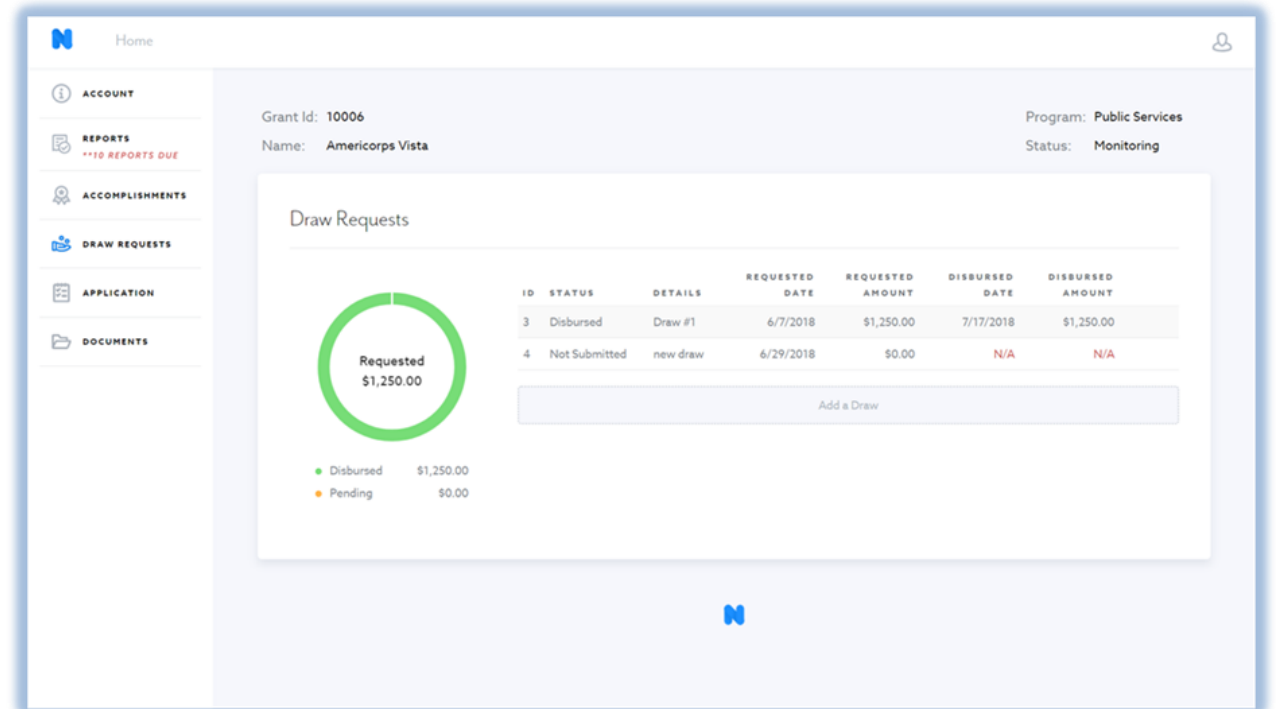# Submitting a Draw Request

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 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.

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

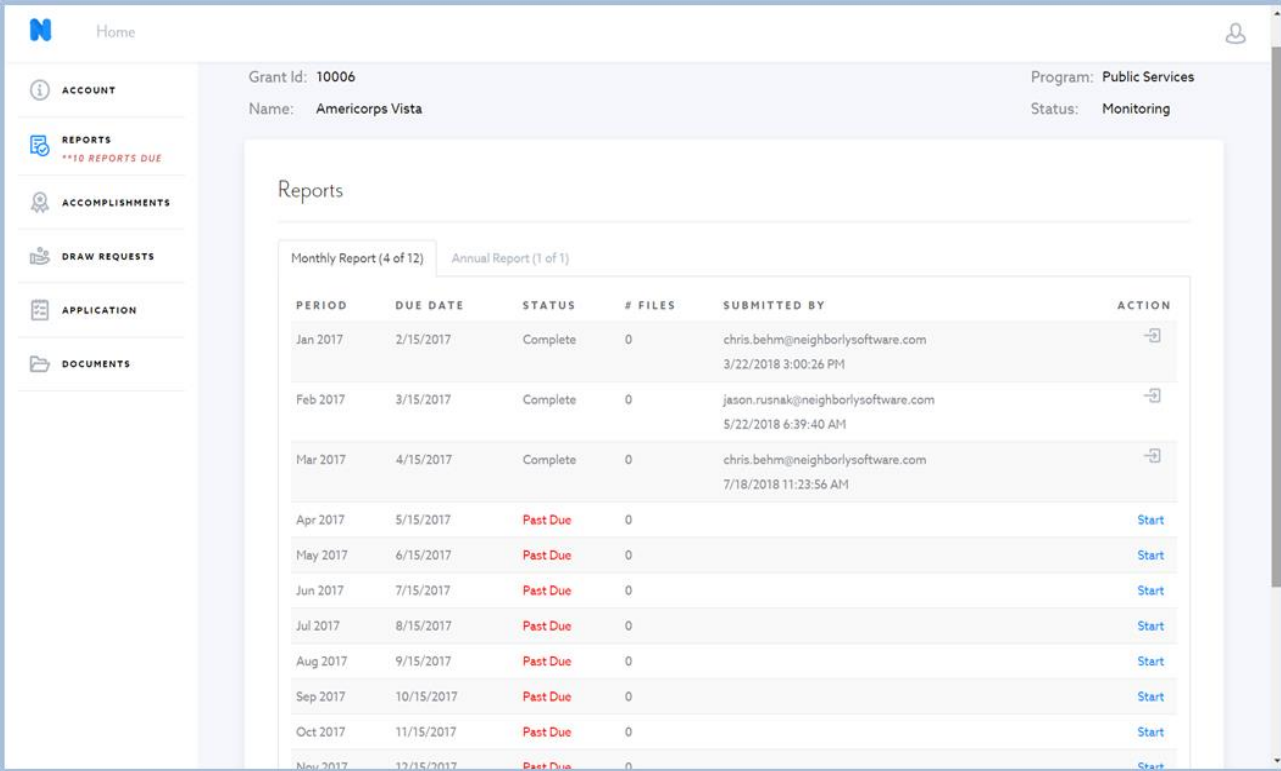# Completing Monthly/Quarterly/Annual Reports

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.

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.

Live Demo

Program Contacts

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Next Steps

- Register your Neighborly Account

- Access your 2021 Grant Submission

- Sign 2021 Grant Contract

- Submit reports and draw requests through Neighborly

Q&A