

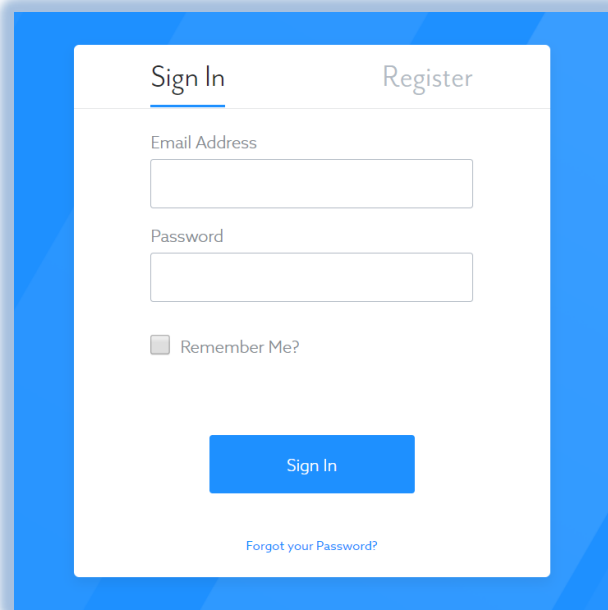
## Table of Contents

Accessing the Subrecipient Portal .....	1
Registering your Account .....	2
Logging In.....	3
Forgot your Password.....	3
Changing your Password .....	3
Signing Out .....	4
Managing your Grant account.....	5
Submitting a Draw Request.....	6
Completing Monthly/Quarterly/Annual Reports .....	8

## 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. FireFox, Safari).

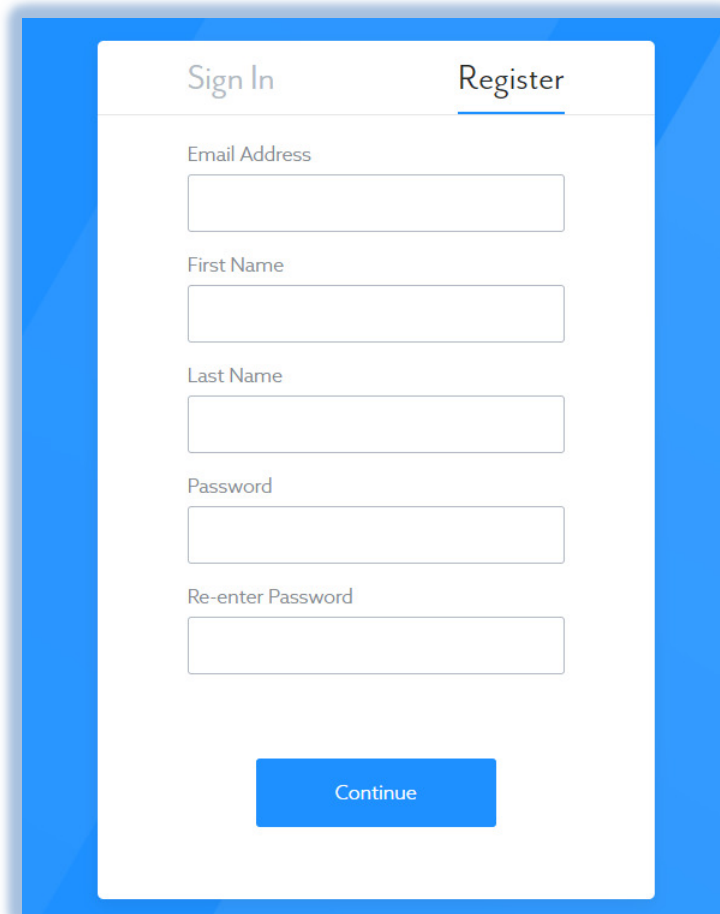
Application Portal Link: <https://portal.neighborlysoftware.com/BOISEID/Participant>



## Registering your Account

When you access the Portal for the first time, you'll need to Register your account by clicking on the Register link. The registration process will create a user name (which is 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. For security purposes, 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.

A screenshot of a web registration form. The form is titled "Sign In" and "Register", with "Register" being the active tab. It contains five input fields: "Email Address", "First Name", "Last Name", "Password", and "Re-enter Password". A blue "Continue" button is located at the bottom of the form.

Sign In Register

Email Address

First Name

Last Name

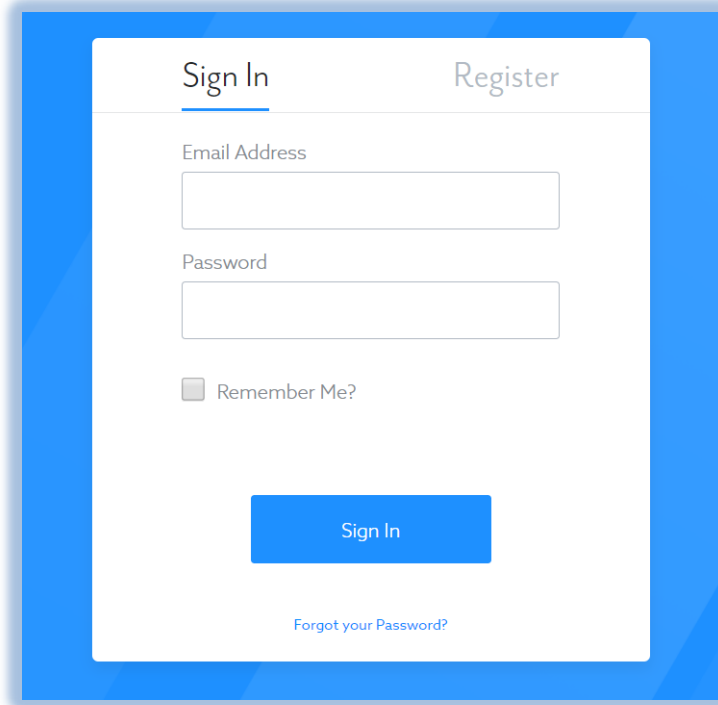
Password

Re-enter Password

Continue

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

A screenshot of a web form for logging in. The form is titled "Sign In" and "Register" at the top. It contains two input fields: "Email Address" and "Password". Below the "Password" field is a checkbox labeled "Remember Me?". At the bottom of the form is a blue button labeled "Sign In" and a link labeled "Forgot your Password?".

Sign In Register

Email Address

Password

Remember Me?


Sign In

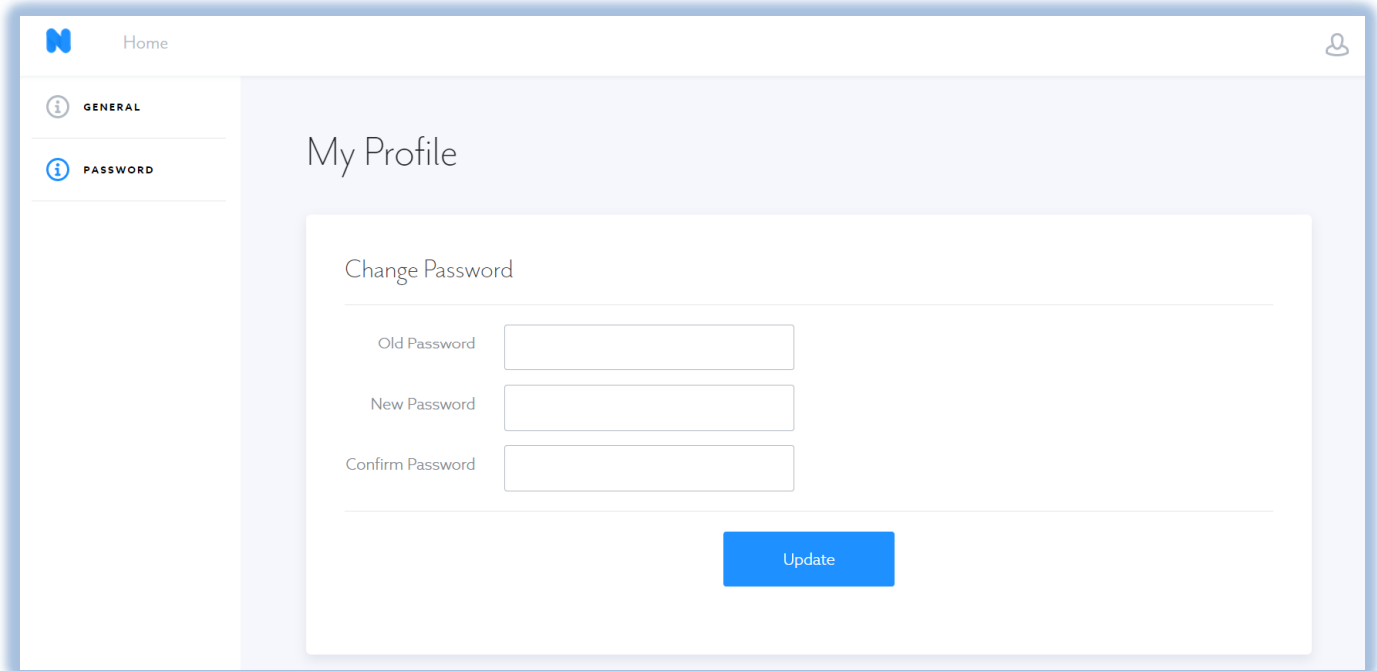
[Forgot your Password?](#)

## 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.



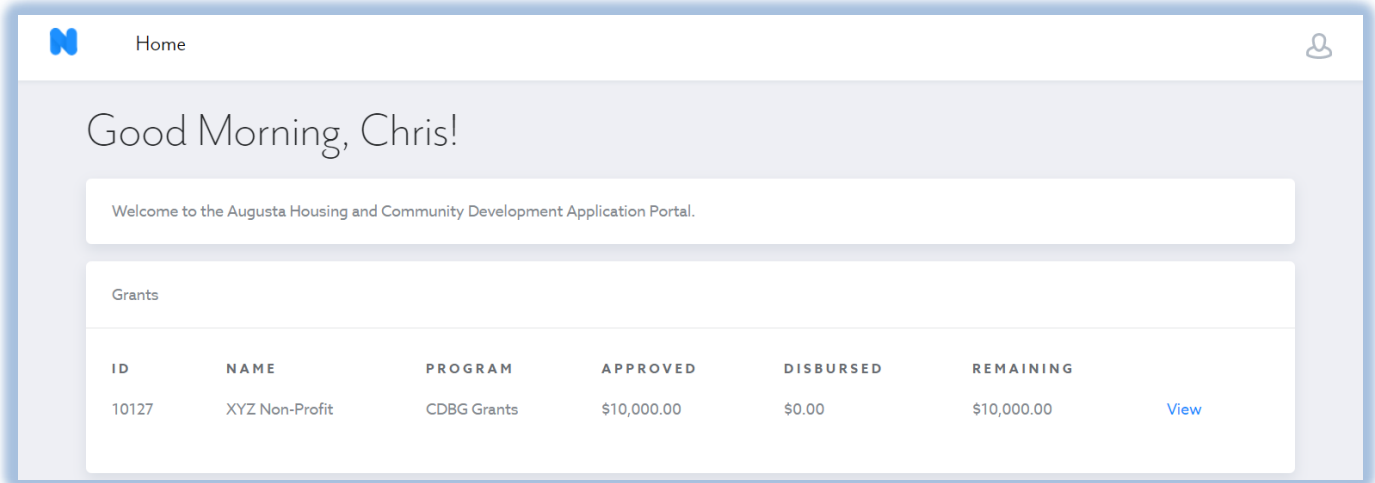
The screenshot displays the 'My Profile' section of the Neighborly Software interface. On the left, there is a sidebar with two tabs: 'GENERAL' and 'PASSWORD'. The 'PASSWORD' tab is currently selected. The main content area is titled 'My Profile' and contains a 'Change Password' form. This form includes three text input fields labeled 'Old Password', 'New Password', and 'Confirm Password'. Below these fields is a blue button labeled 'Update'. The top of the page features a navigation bar with the Neighborly Software logo, the word 'Home', and a user profile icon in the top right corner.

## Signing Out

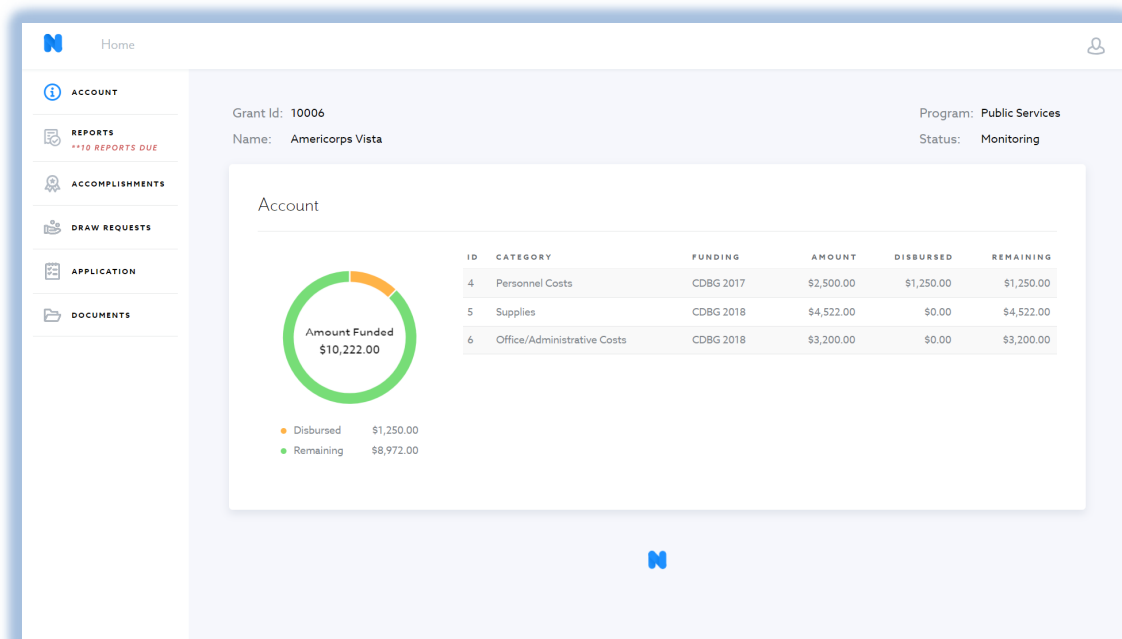
To sign out (aka log out) of the system, click on the  icon on the top right corner of the screen and select "Sign Out".

## Managing 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.



Once loaded, you’ll see the Grant account screen has 6 tabs: 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 Accomplishments screen provides a summary of Accomplishment data entered via Monthly and Annual Reports. Note that this screen is Read Only – accomplishment data can only be added/modified via the Monthly and Annual reports. Also note the scroll bar at the bottom of each section of Accomplishments to view multiple months.

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	
<b>Totals</b>	<b>20</b>	<b>6</b>	<b>0</b>	<b>3</b>	<b>15</b>	<b>0</b>	

## Submitting a Draw Request

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, click on the  icon to the right of the draw. To create a new draw, click the “Add a Draw” link.

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

### Draw Requests

Requested \$1,250.00

- Disbursed \$1,250.00
- Pending \$0.00

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

Add a Draw

When requesting a draw, provide a brief description of the draw request, the amount requested by budget “Category”, and attach any supporting documents as necessary. The draw request will be forwarded to the entitlement jurisdiction for review and approval/denial. You can track the draw request review process by clicking on the “Workflow” tab.

Status: Not Submitted  
Amount Requested: \$0.00  
Date Requested: 6/29/2018  
Amount Approved: \$0.00

Request: Workflow (0 of 4)\*

**\*\*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.

**SUMMARY**

new draw

**DOCUMENTATION**

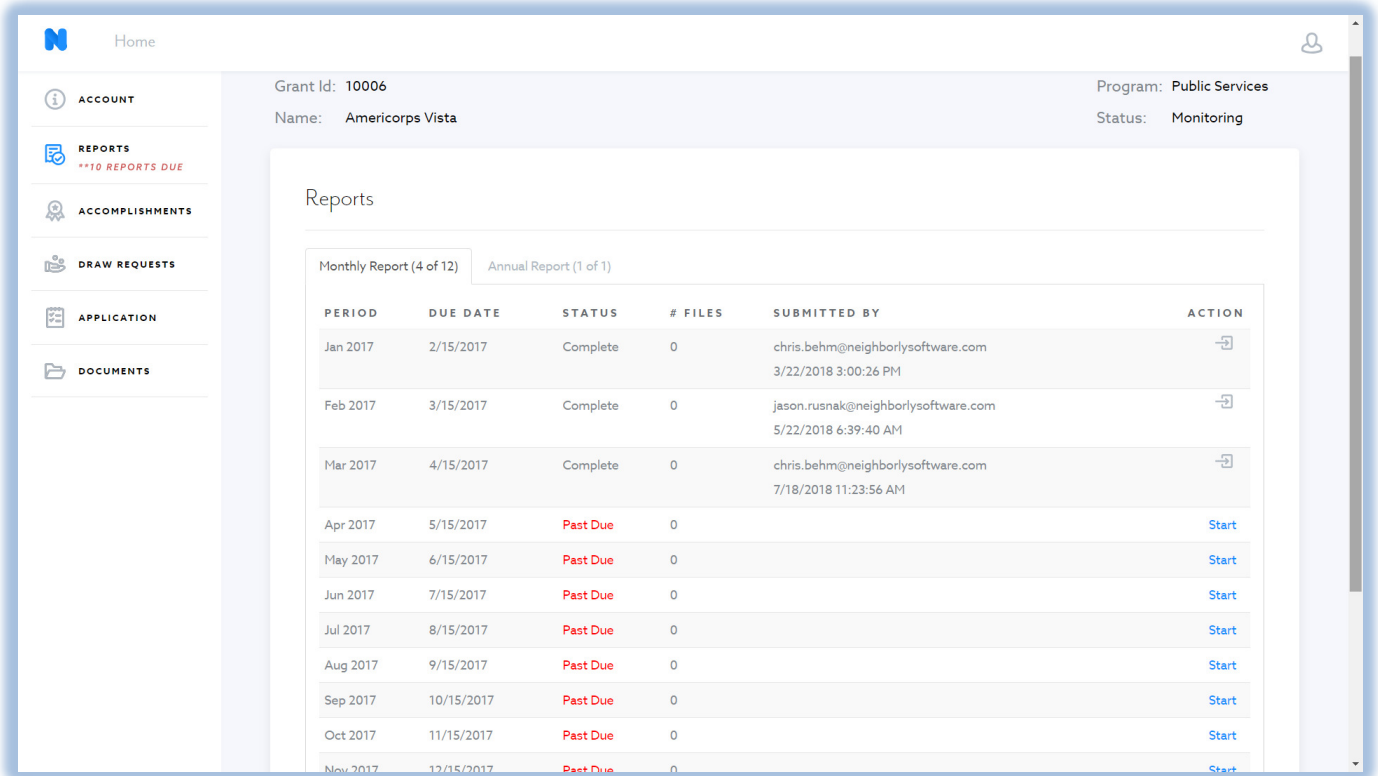
Upload File


**DETAILS**

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

## Completing Monthly/Quarterly/Annual Reports

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.



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

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. Complete each tab by clicking the Complete and Continue link at the bottom of the screen. You may also Save your work to return to the report at a later date. The report is not Complete and Submitted until all tabs are individually marked Complete.