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

Application Portal Link: https://portal.neighborlysoftware.com/copb/participant
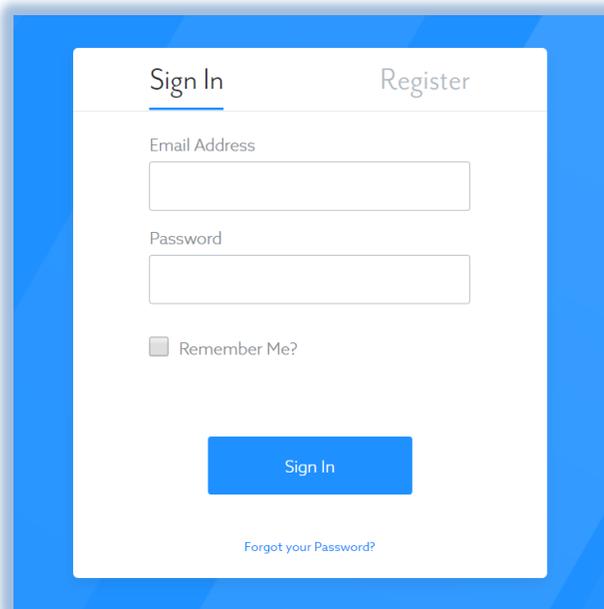
Registering your Account

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 email address) and password that will be used for future logins. The email address you choose will also be used for system emails/notifications, so it is recommended to use your work email address. 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.
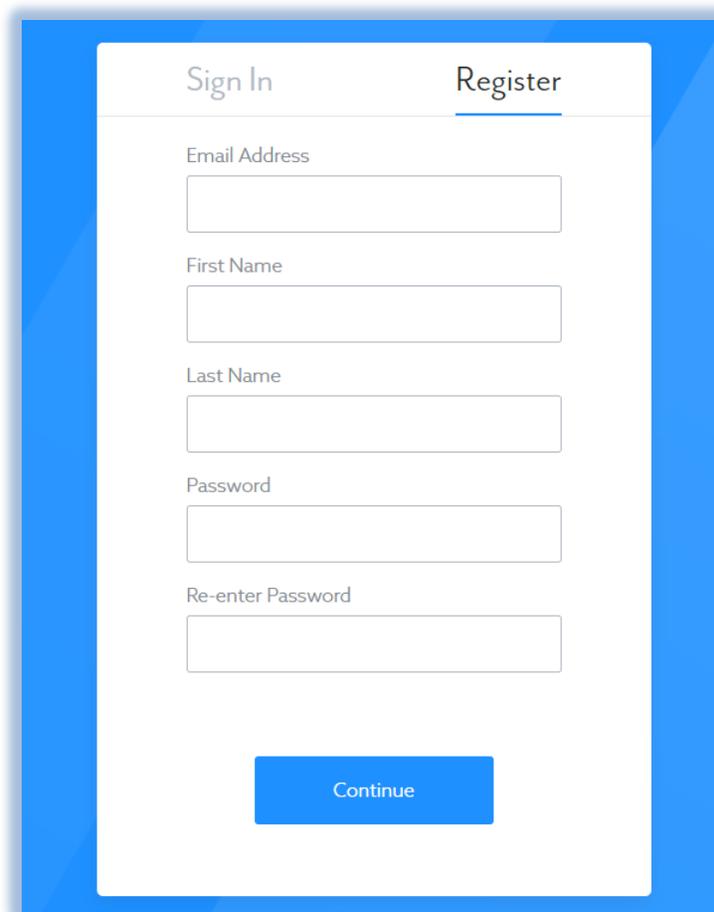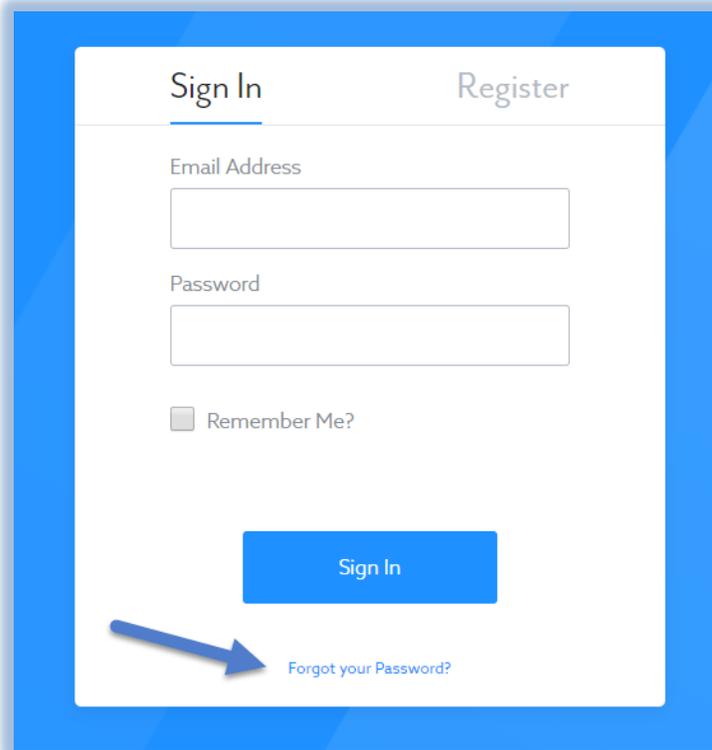
Logging In

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).
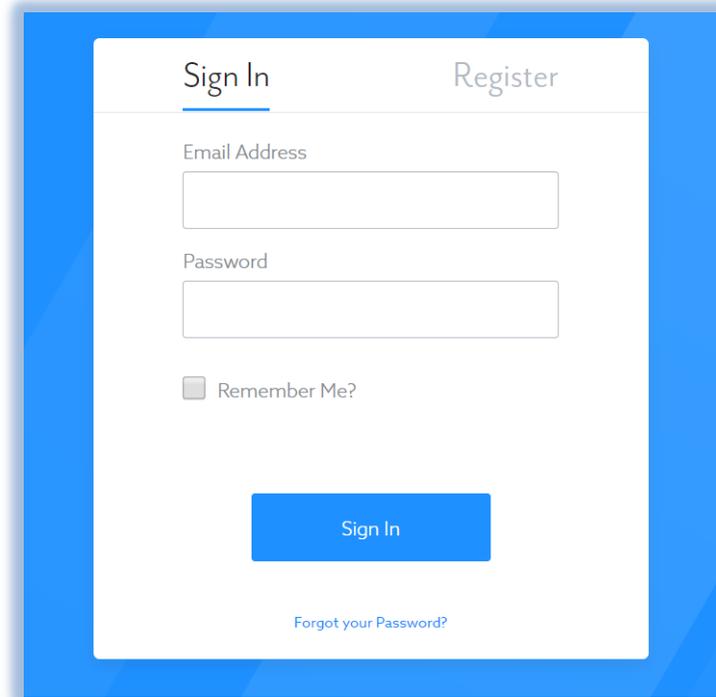
Forgot your Password

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] 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.
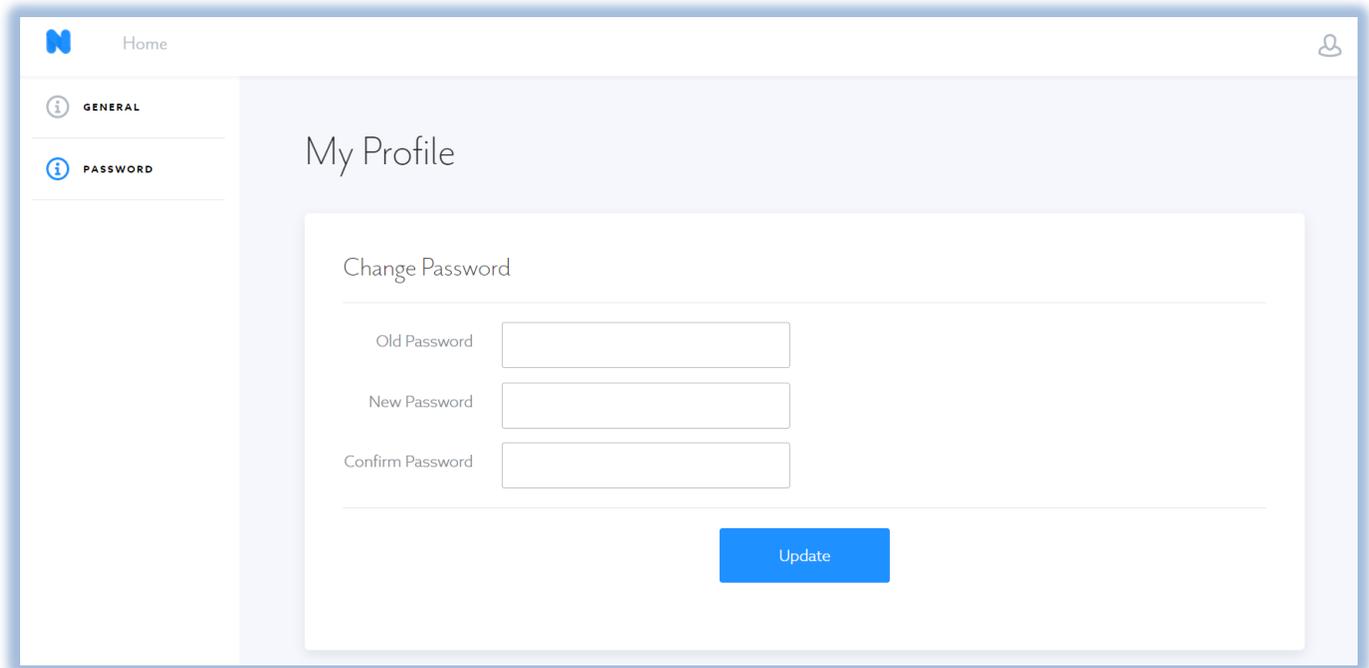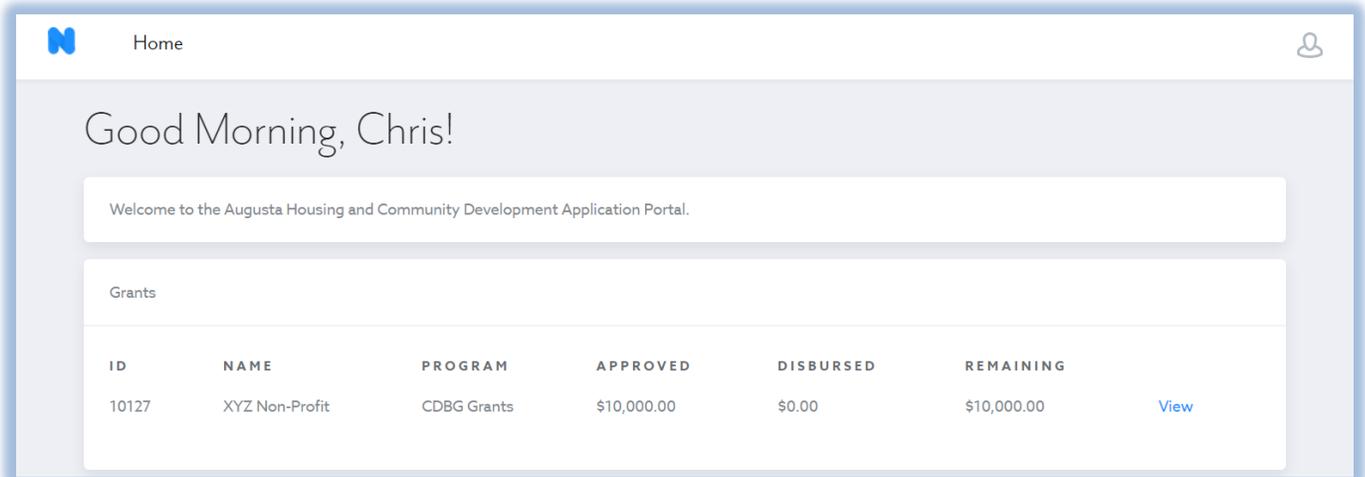

Signing Out

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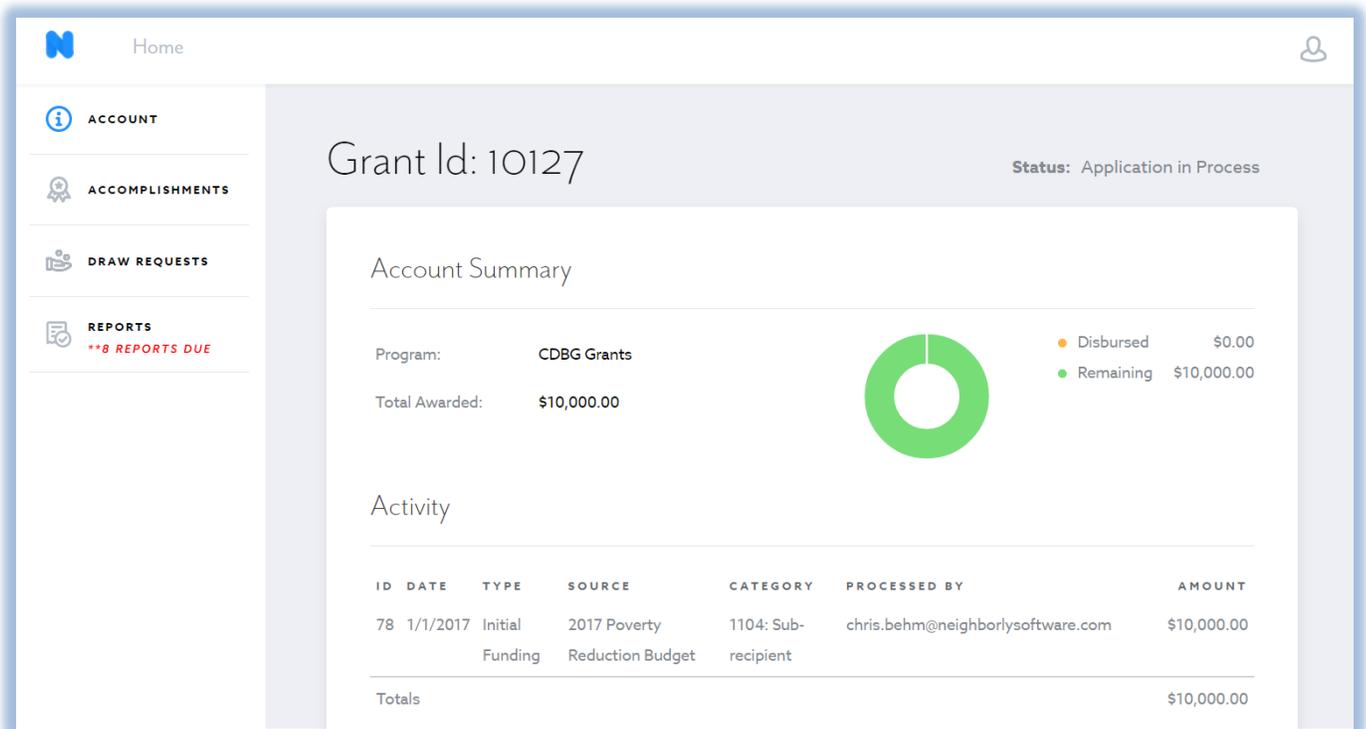
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Managing your Grant account

Upon logging in, you should see your grant account listed in the table Grants. Click View to load the account.

Once loaded, you'll see the Grant account screen has 4 tabs: Account, Accomplishments, Draw Requests and Reports. The Account screen is a summary of your Grant account, including the award amount, funds disbursed and funding activity associated with your account.

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.

The Draw Requests allows you to request draws. The initial screen is a summary of any existing draw requests and disbursement data. To view an existing draw, click on the [icon] icon to the right of the draw. To create a new draw, click the Request a Draw link.
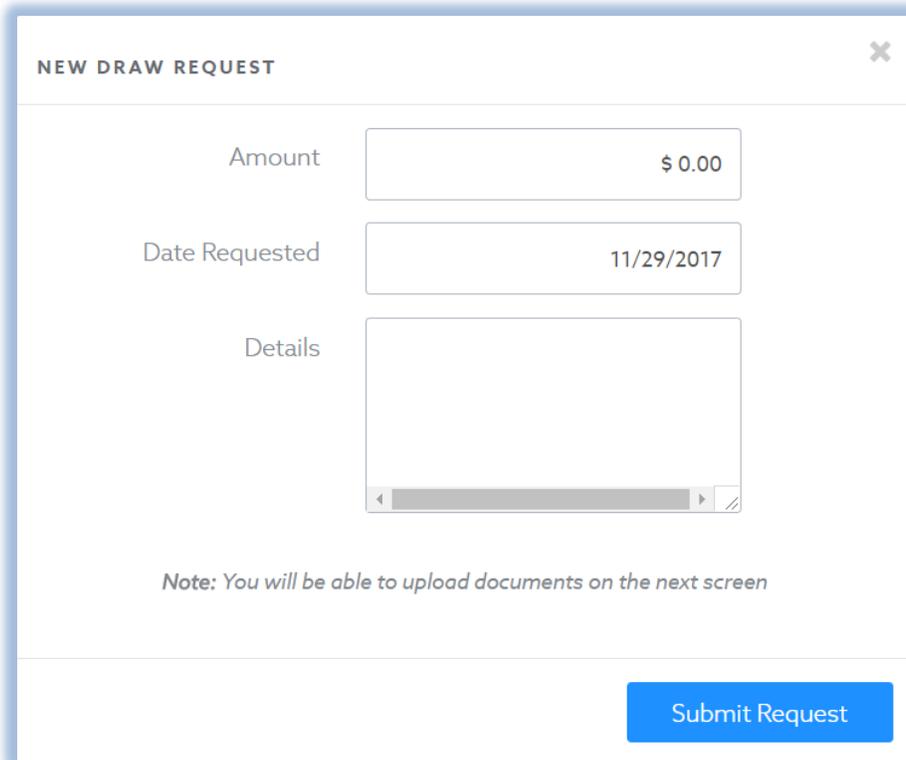
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When requesting a draw, provide the Amount, Date Requested and any details regarding the draw request. This information will be provided to your program manager. Note that you may upload supporting documentation after clicking Submit Request.

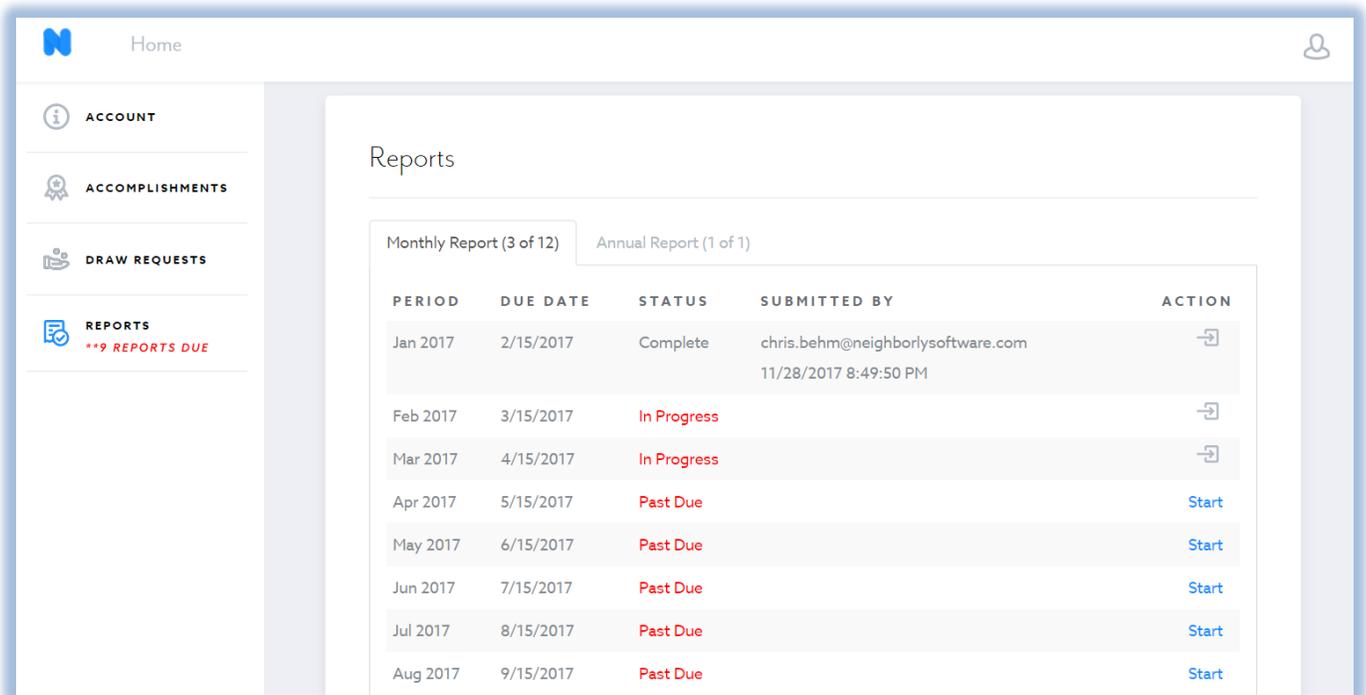Within the draw request, you can see details regarding the disbursement (if funds have been disbursed) and a link to upload any supporting documentation.
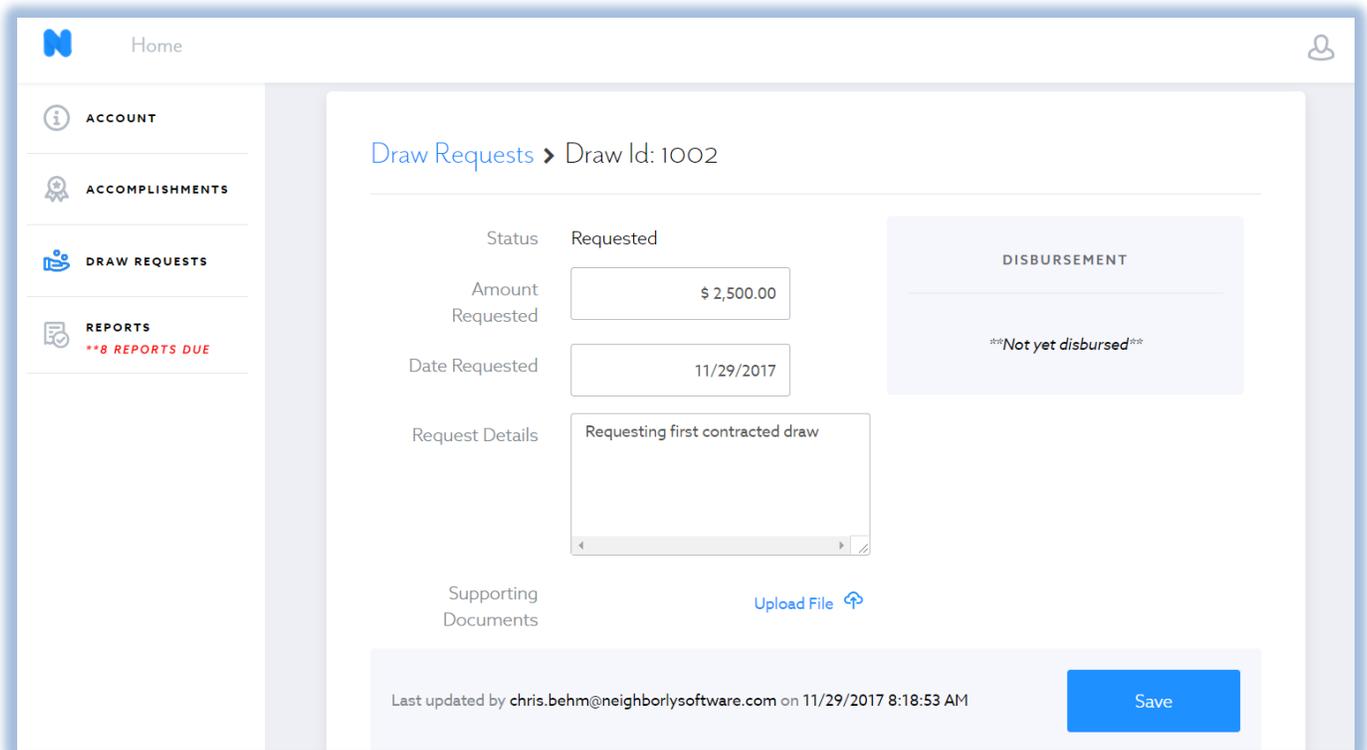
The Reports tab will indicate if any reports are Due or Past Due. Once you click into the Reports section, you'll see a summary of reports, including tabs for Monthly and Annual Reports.

Click into a report by clicking the [icon] 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 considered Complete until all tabs are individually marked Complete.