

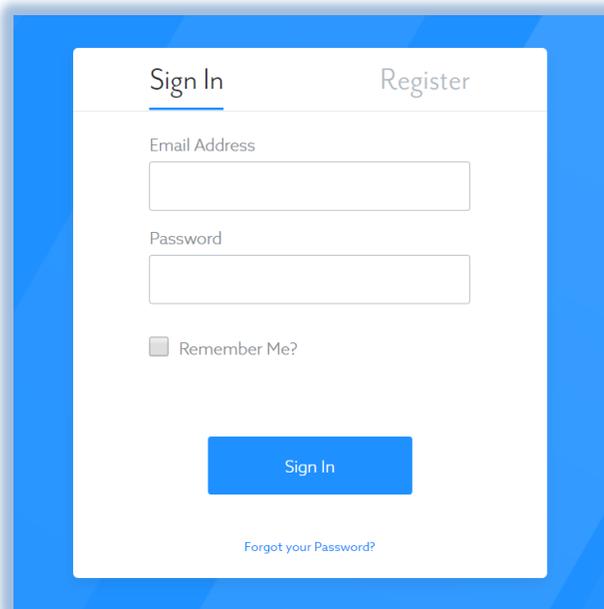
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## Accessing the Subrecipient Portal

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).

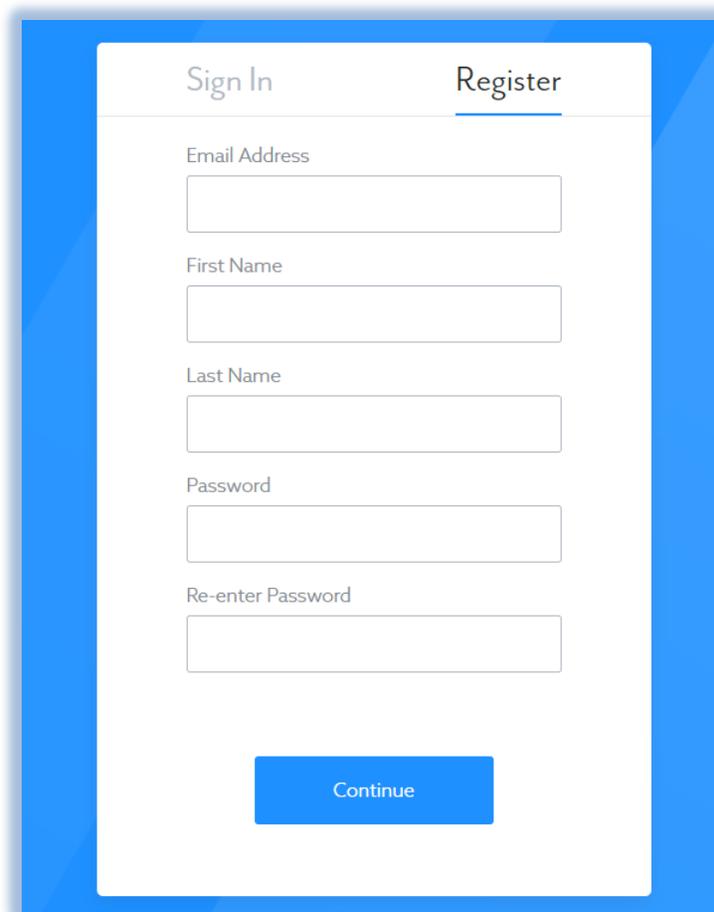
Application Portal Link: <https://portal.neighborlysoftware.com/copb/participant>



## 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.

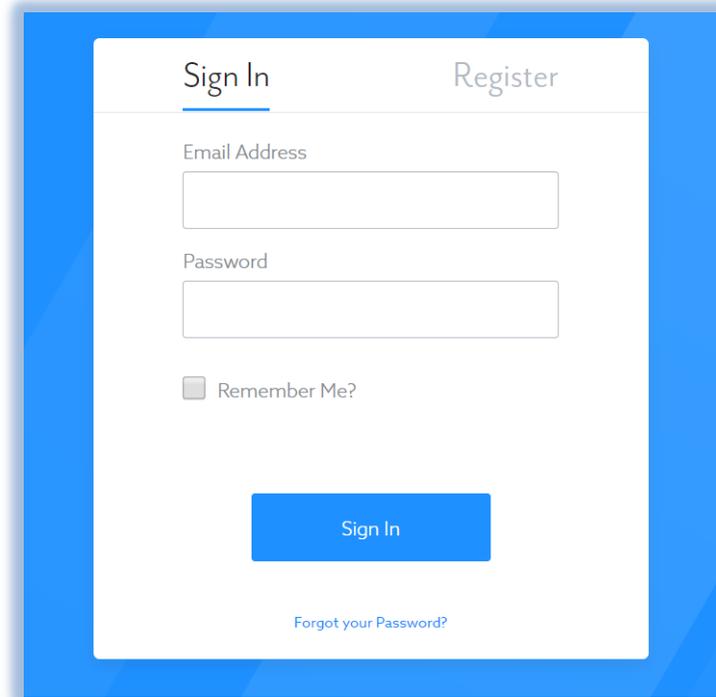
**Note:** If you do not receive the system email within 2 minutes, check your spam or bulk mail folder. If the email appears in that folder, you should right click on the email to indicate "Not Junk" or "Not Spam" to ensure you receive any other system notifications.



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

## Logging In

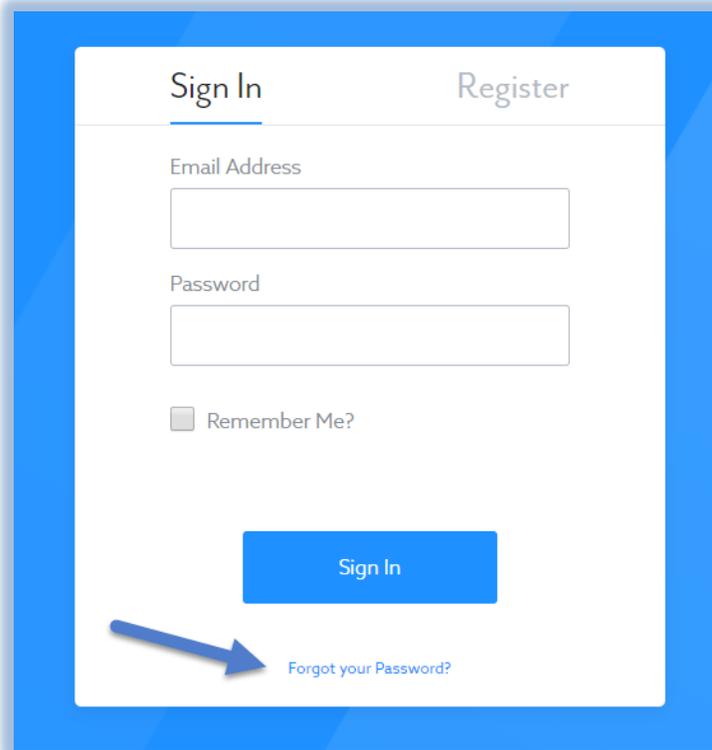
Once your account has been registered, you may login (using the same link above) by entering the email address and password used during registration. By checking “Remember Me?”, your web browser will remember your email address for future logins (depending on browser and security settings).



The image shows 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?".

## Forgot your Password

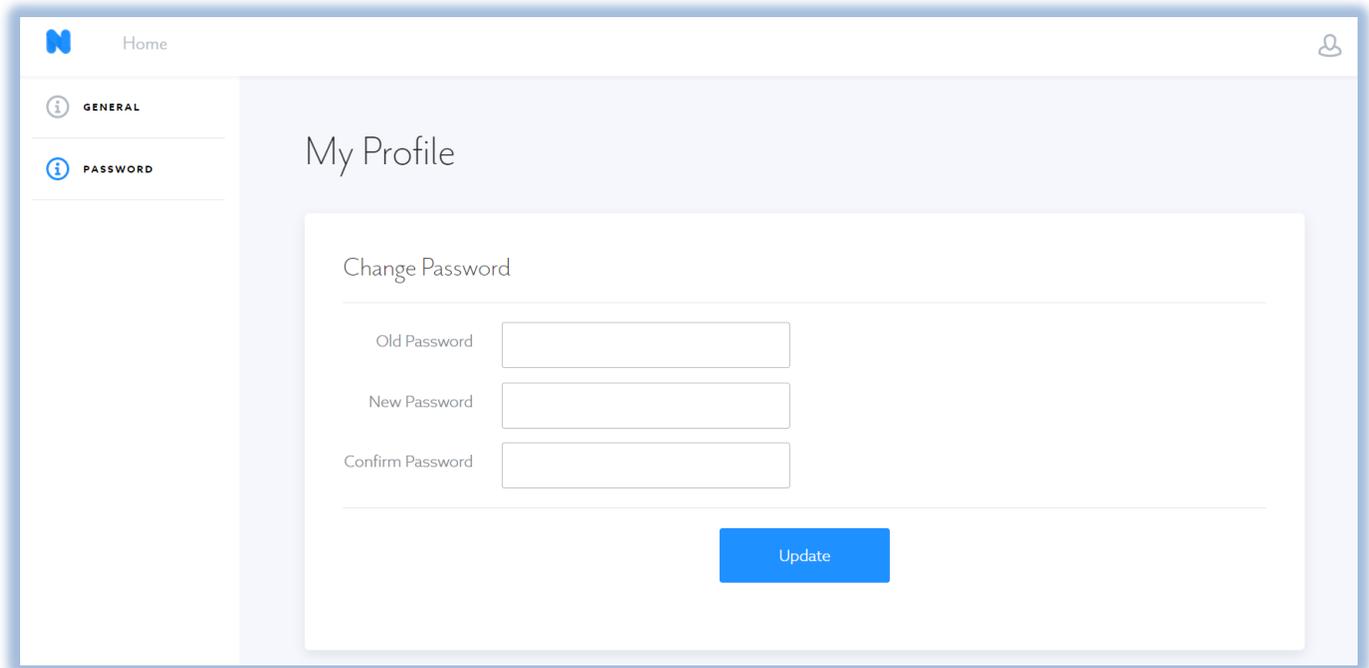
If you forget your password, click on the link that says “Forgot your Password?” and follow the prompts to create a new password. For security purposes, the system will send an email to the registered email address with a link to reset your password.



The screenshot shows a login form with two tabs: "Sign In" (active) and "Register". Below the tabs are two input fields: "Email Address" and "Password". There is a checkbox labeled "Remember Me?". A blue "Sign In" button is positioned below the "Remember Me?" checkbox. At the bottom right of the form, there is a link that says "Forgot your Password?". A blue arrow points to this link.

## 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.



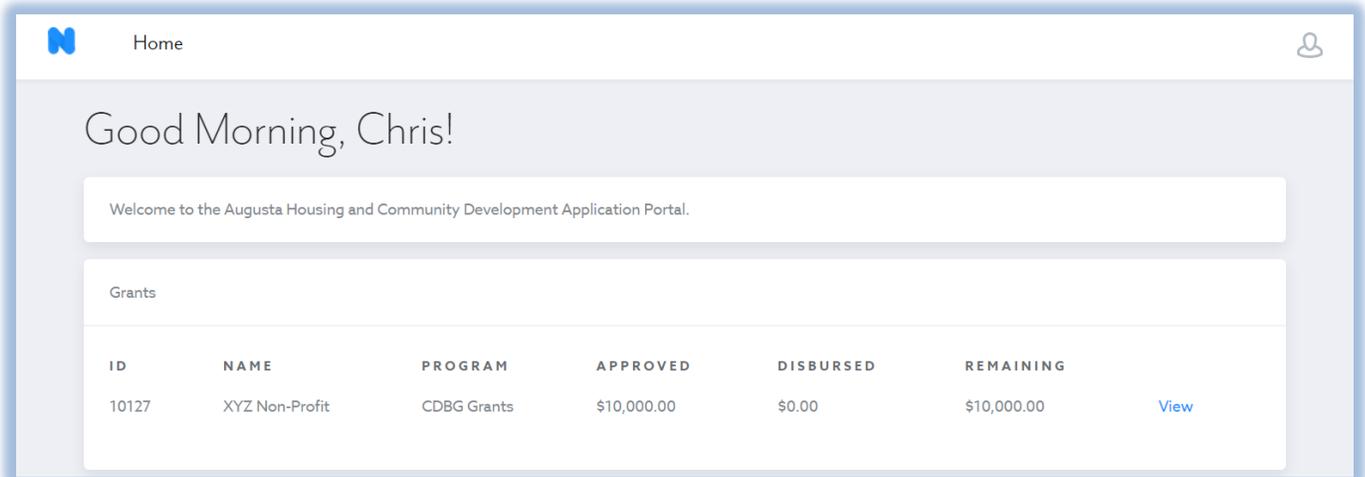
The screenshot shows a web application interface. At the top left, there is a blue 'N' logo and the text 'Home'. At the top right, there is a user profile icon. On the left side, there is a navigation menu with two options: 'GENERAL' and 'PASSWORD', both with information icons. The main content area 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 form is a blue 'Update' button.

## 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

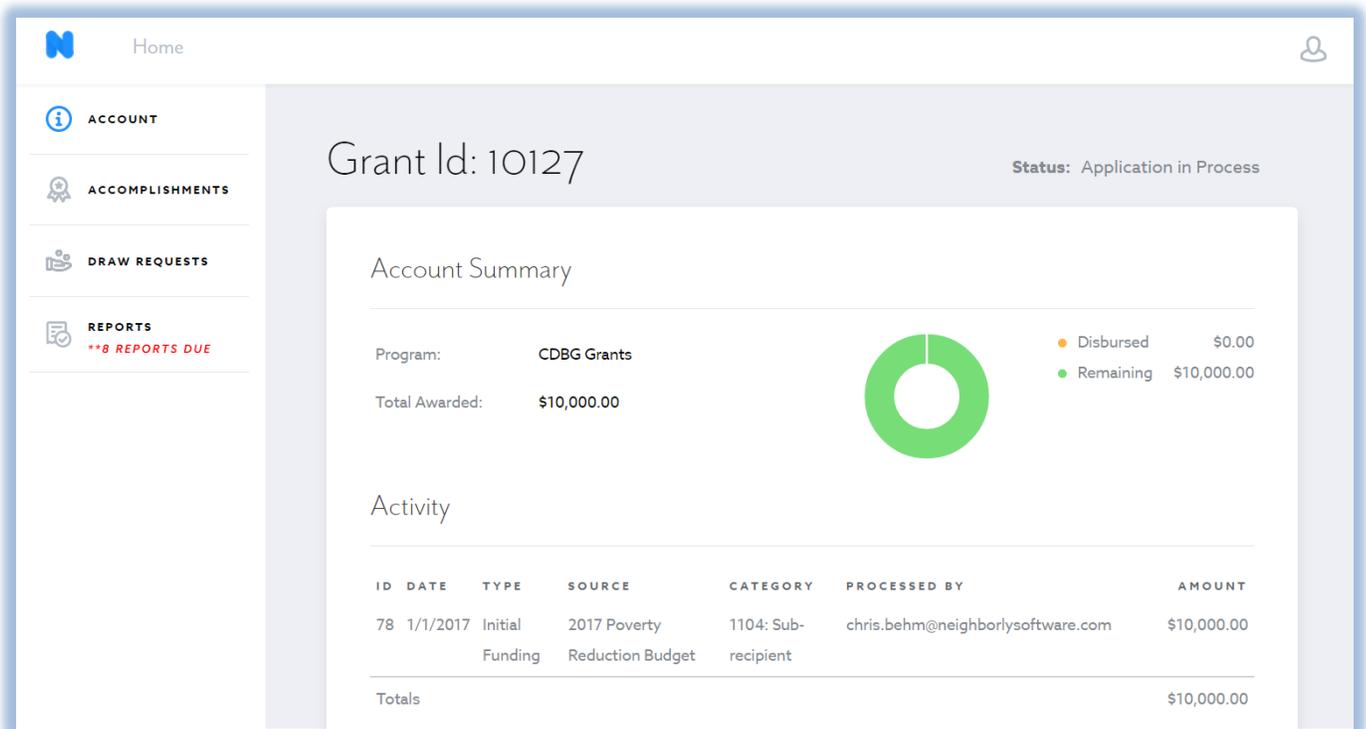
Upon logging in, you should see your grant account listed in the table Grants. Click View to load the account.



The screenshot shows a user interface for the August Housing and Community Development Application Portal. At the top, there is a navigation bar with a blue 'N' logo and the word 'Home'. Below this, a greeting reads 'Good Morning, Chris!' followed by a welcome message: 'Welcome to the Augusta Housing and Community Development Application Portal.' The main content area features a table titled 'Grants' with the following data:

ID	NAME	PROGRAM	APPROVED	DISBURSED	REMAINING	
10127	XYZ Non-Profit	CDBG Grants	\$10,000.00	\$0.00	\$10,000.00	<a href="#">View</a>

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.



Home User Icon

**ACCOUNT** | **ACCOMPLISHMENTS** | **DRAW REQUESTS** | **REPORTS** \*\*8 REPORTS DUE

## Grant Id: 10127

Status: Application in Process

### Account Summary

Program: CDBG Grants 
● Disbursed \$0.00  
● Remaining \$10,000.00

Total Awarded: \$10,000.00

### Activity

ID	DATE	TYPE	SOURCE	CATEGORY	PROCESSED BY	AMOUNT
78	1/1/2017	Initial Funding	2017 Poverty Reduction Budget	1104: Sub-recipient	chris.behm@neighborlysoftware.com	\$10,000.00
Totals						\$10,000.00

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.

Home

Grant Id: 10127 Status: Application in Process

**Accomplishments**

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

BENEFICIARIES - INCOME	JAN 2017	FEB 2017	MAR 2017	APR 2017
Number of Extremely Low Income persons assisted	4		3	
Number of Low Income persons assisted	4			
Number of Moderate Income persons assisted	4			
Number of persons assisted who are NOT Low to Moderate Income	4			
<b>Totals</b>	<b>16</b>	<b>0</b>	<b>3</b>	

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 to the right of the draw. To create a new draw, click the Request a Draw link.

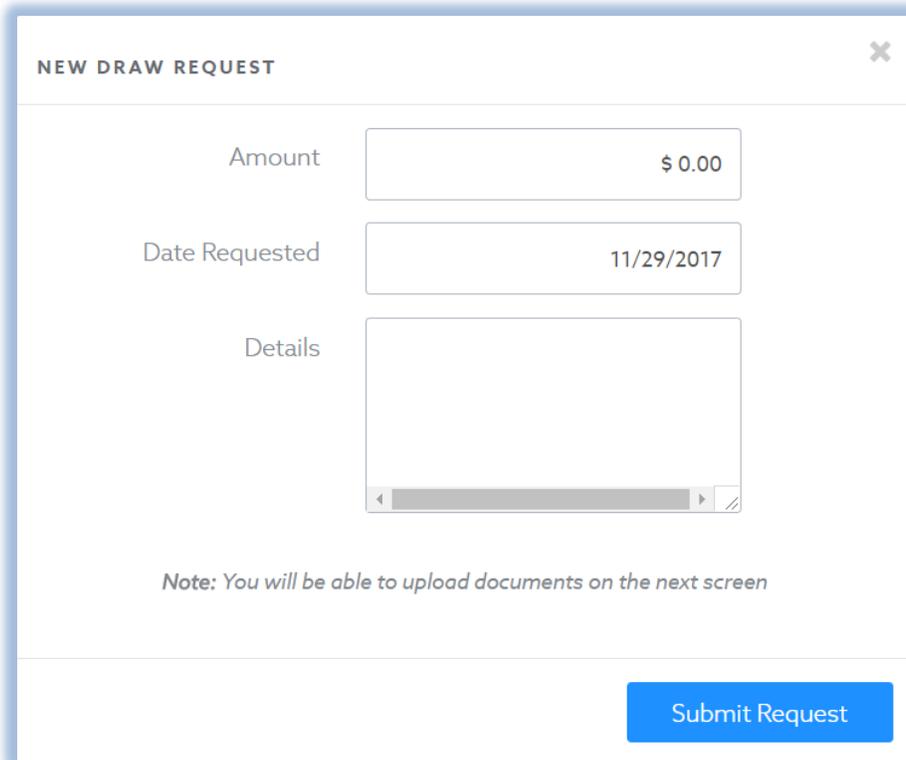
Home

Grant Id: 10127 Status: Application in Process

**Draw Requests** [Request a Draw](#)

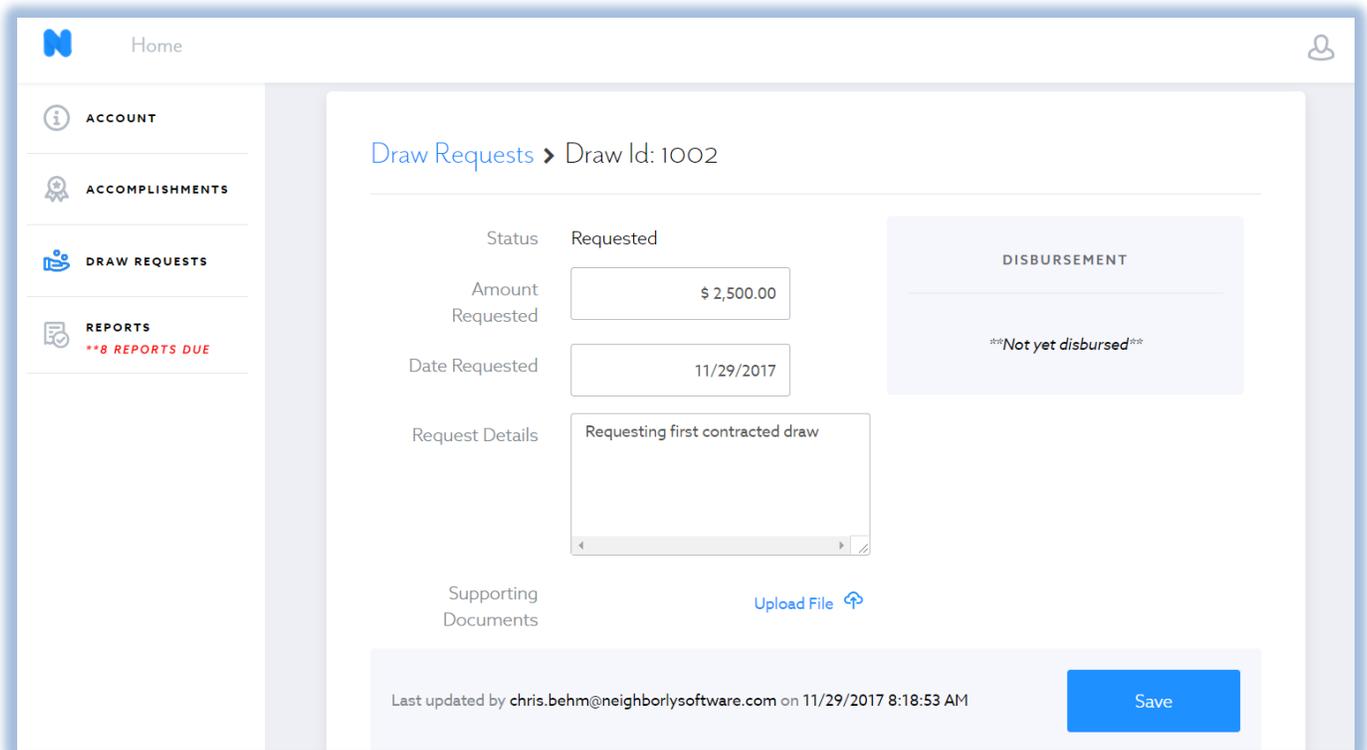
ID	STATUS	DETAILS	REQUESTED DATE	REQUESTED AMOUNT	DISBURSED DATE	DISBURSED AMOUNT	
1002	Requested	Requesting first contracted draw	11/29/2017	\$2,500.00		\$0.00	
<b>Totals</b>				<b>\$2,500.00</b>		<b>\$0.00</b>	

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.

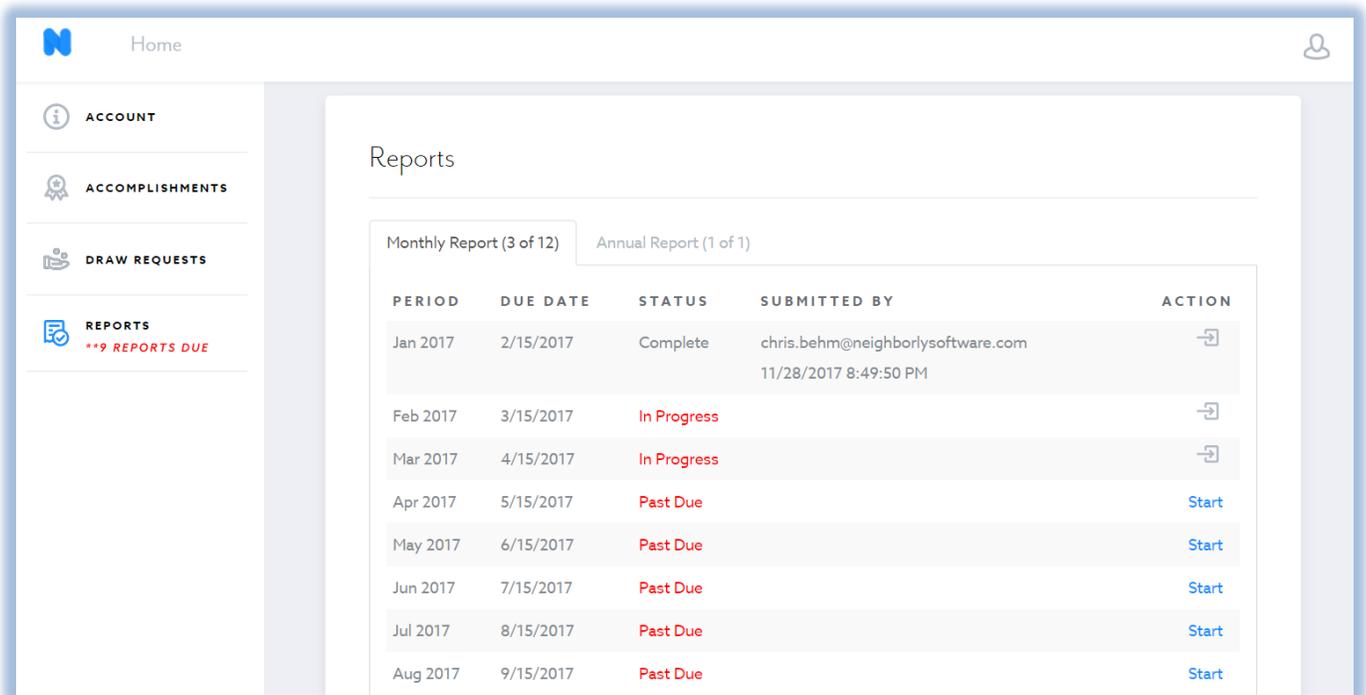


The screenshot shows a web form titled "NEW DRAW REQUEST" with a close button (X) in the top right corner. The form contains three input fields: "Amount" with a value of "\$ 0.00", "Date Requested" with a value of "11/29/2017", and "Details" which is a large empty text area with a scrollbar. Below the form is a blue button labeled "Submit Request". A note at the bottom of the form reads: "Note: You will be able to upload documents on the next screen".

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 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.