



MERIDIAN CDBG PROGRAM

NEIGHBORLY SOFTWARE USER GUIDE

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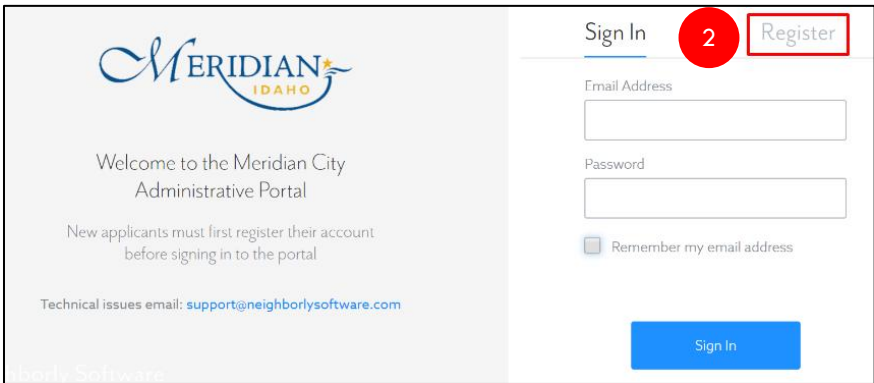
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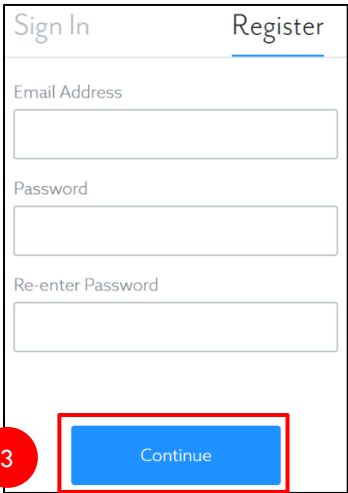
REGISTERING FOR SOFTWARE

THIS SECTION WILL HELP YOU SET UP AN ACCOUNT IF YOU HAVE NEVER ACCESSED THE SYSTEM BEFORE. **EACH USER SHOULD HAVE THEIR OWN LOG-IN** AS ALL ACTIVITIES IN THE SYSTEM WILL BE ATTRIBUTED TO THE USER AND DOCUMENTED IN THE OFFICIAL AUDIT LOG.

- 1. Access the website at:
<https://portal.neighborlysoftware.com/meridianid/Participant/Login> and bookmark it.
- 2. Select the "Register" tab.



- 3. Complete the form and select "Continue".



ACCOUNT

THIS SECTION SHOWS HOW TO REVIEW THE OVERALL BUDGET.

- 1. From the left-hand navigation pane select the “Account” tab. On this screen you can review the following:
 - a. Amount funded – total amount funded as well as the breakdown of funds that have been disbursed or are pending
 - b. Category – breakdown of eligible activities
 - c. Funding – source of funding (e.g. PY20)
 - d. Amount – amount funded in each category
 - e. Disbursed – amount disbursed by category
 - f. Remaining – remaining balance by category

ID	CATEGORY	FUNDING	AMOUNT	DISBURSED	REMAINING
40	Direct Client Services (Staff Time)	Test Funding	\$50,000.00	\$0.00	\$50,000.00
39	Other	Test Funding	\$30,000.00	\$12,000.00	\$18,000.00

REPORTS

THIS SECTION WILL SHOW HOW TO SUBMIT REQUIRED REPORTS.

PROGRESS REPORTS

Progress reports are required at regular intervals throughout the lifetime of your grant. The subrecipient agreement will specify how often you are required to submit your progress report.

1. From the left-hand navigation pane select the "Reports" tab.

The screenshot shows the 'Account' page. On the left, a navigation pane lists: ACCOUNT, REPORTS (highlighted in red with a red circle '1' next to it), ACCOMPLISHMENTS, DRAW REQUESTS, APPLICATION, DOCUMENTS, and USERS. The main area displays 'Account' information, including a donut chart for 'Amount Funded' (\$80,000.00) and a table of funding details.

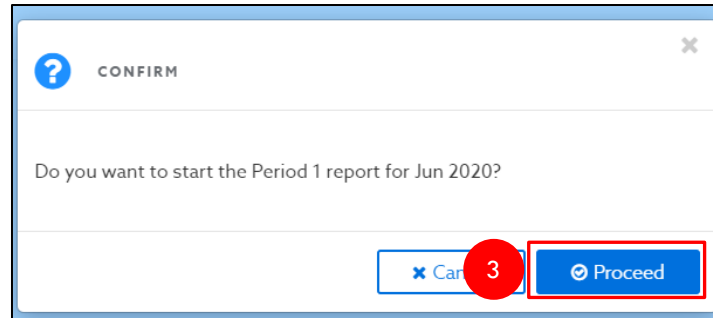
ID	CATEGORY	FUNDING	AMOUNT	DISBURSED	REMAINING
40	Direct Client Services (Staff Time)	Test Funding	\$50,000.00	\$0.00	\$50,000.00
39	Other	Test Funding	\$30,000.00	\$12,000.00	\$18,000.00

2. The Reports tab will automatically go to Progress Report. Select "Start".

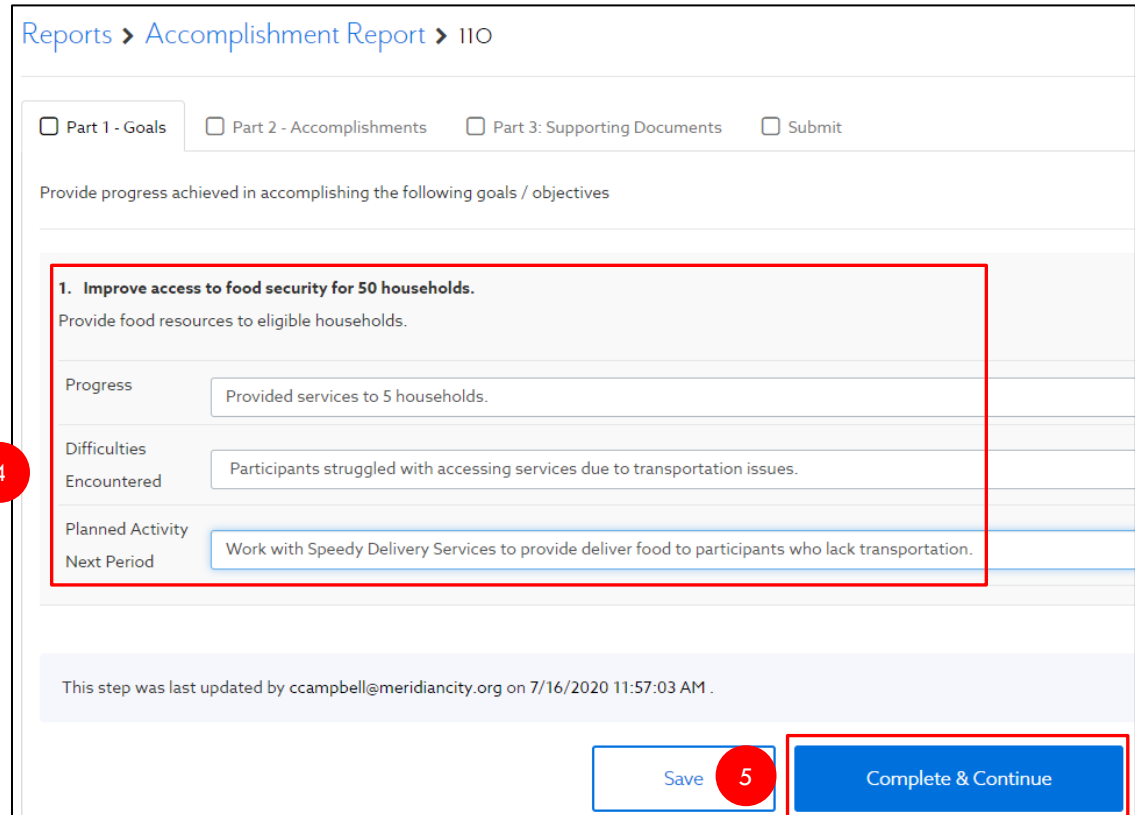
The screenshot shows the 'Reports' page. At the top, it displays 'Case Id 30059' and 'Name ABC Agency'. Below, there are tabs for 'Accomplishment Report (0 of 12)' and 'Final Report (0 of 1)'. A table lists reports with columns: PERIOD, DATE RANGE, DUE DATE, STATUS, # FILES, SUBMITTED BY, and ACTION. The 'Start' button in the ACTION column is highlighted in red with a red circle '2' next to it.

PERIOD	DATE RANGE	DUE DATE	STATUS	# FILES	SUBMITTED BY	ACTION
1	Jun 2020 6/1/2020-6/30/2020	7/17/2020	Available Now	0		Start

3. A pop-up will ask if you want to start the report. Select "Proceed".



4. Enter the progress, difficulties encountered, and planned activity next period for each goal that is listed. Updates should be specific to this reporting period.
Note: actual goals will vary by project.
5. Select "Complete & Continue."



6. Select “Part 2 – Accomplishments” tab.
7. Complete all accomplishments listed. The subrecipient agreement will specify if you should be reporting based on the number of households or the number of individuals. Be sure to know which you should be reporting on as this is submitted to HUD.
Note: actual accomplishments will vary by project.
8. Select “Complete & Continue”.

Reports > Accomplishment Report > 110

Part 1 **6** Part 2 - Accomplishments Part 3: Supporting Documents Submit

Accomplishments

Use the links to the left to provide Accomplishments for the current month.

Only click Complete and Submit on this step once Accomplishments have been provided.

TOTAL NUMBER OF PERSONS ASSISTED

Total Number of Unique Persons Assisted this reporting period

No save history

8

9. Select “Part 3 – Supporting Documents” tab.
10. If there are supporting documents to include select “Upload” and attach them from your computer.
Note: most progress reports will not require supporting documents.
11. Select “Complete & Continue”.

Reports > Accomplishment Report > 110

Part 1 - Goals Part 2 - Accomplishments **9** Part 3: Supporting Documents Submit

Part 3: Supporting Documents

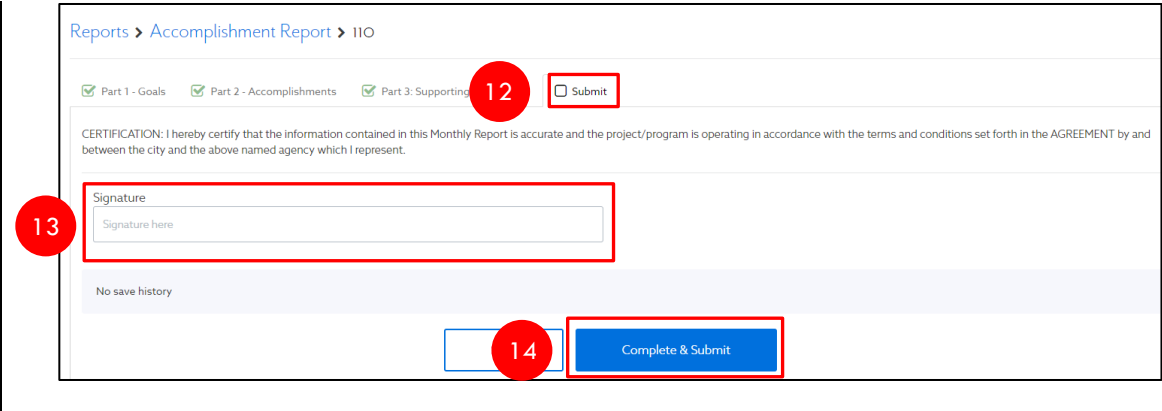
Documentation

Supporting Documents **10**

No save history

11

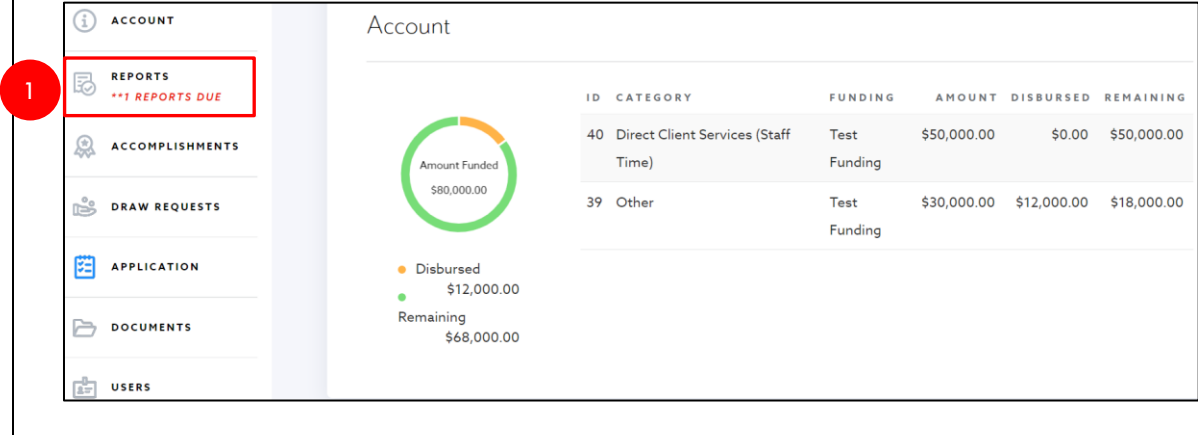
- 12. Select "Submit" tab.
- 13. Read certification and enter your name in the signature line.
Note: Do not sign for someone else.
- 14. Select "Complete & Submit."



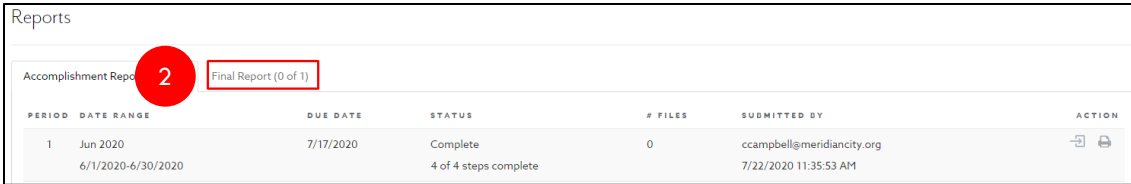
FINAL REPORT

THE FINAL REPORT IS DUE 15 DAYS AFTER THE END OF THE GRANT PERIOD.

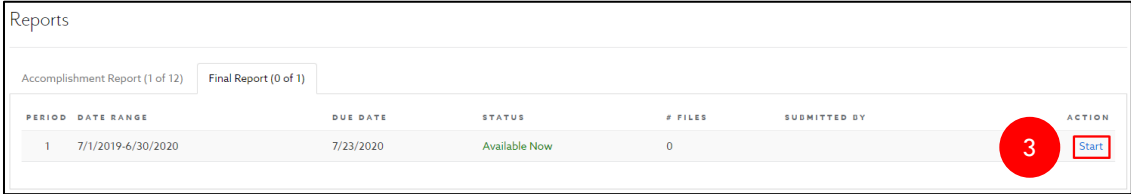
- 1. From the left-hand navigation pane select the "Reports" tab.



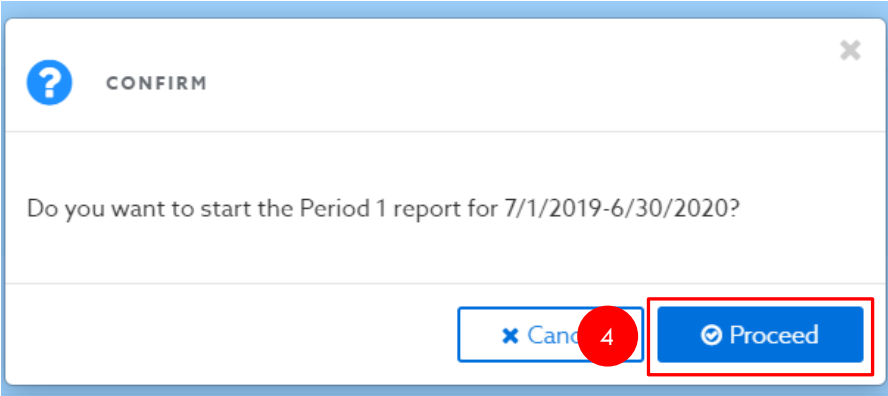
2. Select "Final Report" tab.



3. Select "Start".



4. A pop-up will ask if you want to start the report. Select "Proceed".



- 5. Provide responses in fields provided.
- 6. Select "Complete & Continue".

Final Report
Please provide the following information

How does the completed project compare to the Level of Service stated in Section I. of the Subrecipient Agreement? Include the number of units at completion, goal comparison, analysis of project, and major milestones.

Enter the amount of funding provided by each of the sources listed. Be sure to include other funds that were leveraged to complete this project.

FUNDING SOURCE	AGGREGATE AMOUNT	DETAIL OF FUNDING SOURCE AND AMOUNT
CDBG	<input type="text"/>	(e.g. City of Meridian CDBG - \$15,000)
Other Federal	<input type="text"/>	(e.g. City of Meridian CDBG - \$15,000)
State	<input type="text"/>	(e.g. City of Meridian CDBG - \$15,000)
Local	<input type="text"/>	(e.g. City of Meridian CDBG - \$15,000)
Other	<input type="text"/>	(e.g. City of Meridian CDBG - \$15,000)
	<input type="text" value="\$ 0.00"/>	

No save history

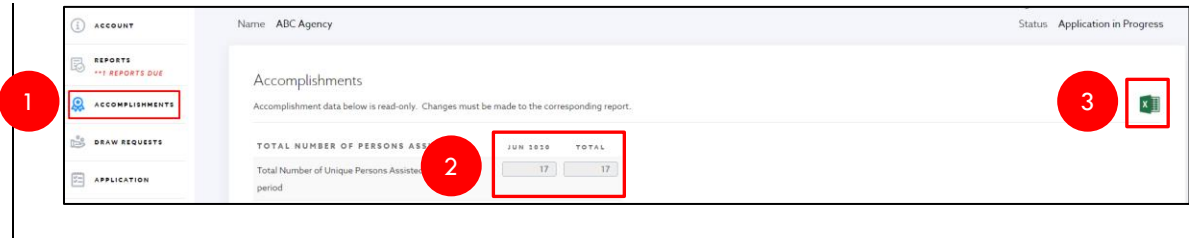
- 7. Select the "Closeout Certification" tab.
- 8. Complete all fields.
- 9. Select "Complete & Submit".

The screenshot shows a web form titled "Closeout Certification". At the top, there is a tab labeled "Closeout Certification" with a red circle containing the number 7 next to it. Below the tab, the text reads "Please provide the following information". A sub-header "Closeout Certification" is followed by a note: "This certification is a requirement per 2 CFR § 200.415 and must be signed by a person with the authority to legally bind the organization, ideally the person who signed the subrecipient agreement." A large red box, labeled with a red circle containing the number 8, encompasses the main form fields: Agency Name, Project Name, Program Year, Start Date, and End Date. Below these fields, there are three checkboxes for certification statements. A paragraph of legal text follows. At the bottom, there are fields for Name, Title, Signature, and Date. A "No save history" message is visible. At the very bottom, a blue button labeled "Complete & Submit" is highlighted with a red box and a red circle containing the number 9.

ACCOMPLISHMENTS

THIS SECTION WILL SHOW HOW TO VIEW THE MONTHLY AND CUMULATIVE NUMBER SERVED.

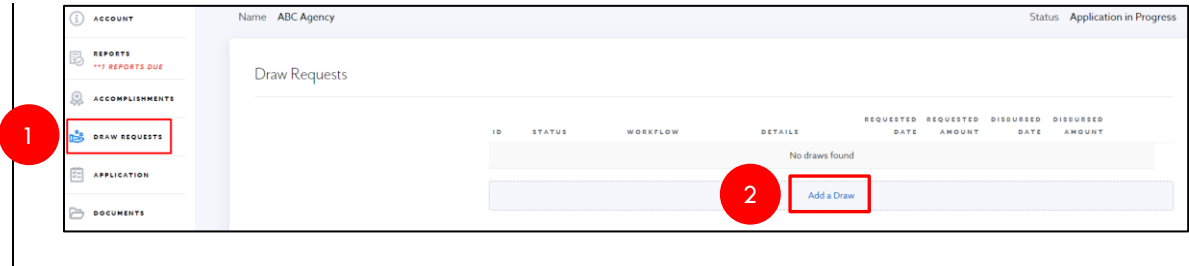
1. From the left-hand navigation pane select the “Accomplishments” tab.
2. Accomplishments will be listed by month and will show the total for all months combined.
3. To export click on the excel icon.



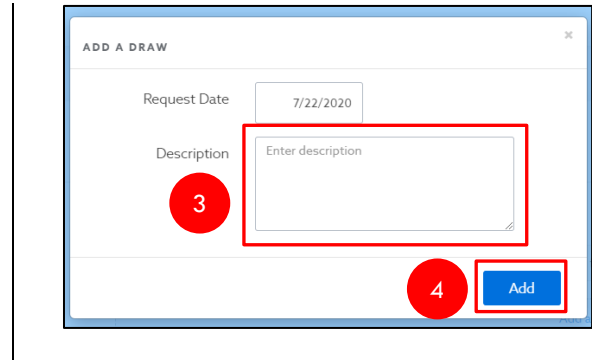
DRAW REQUESTS

THIS SECTION WILL SHOW HOW TO CREATE A DRAW REQUEST.

1. From the left-hand navigation pane select the “Draw Requests” tab.
2. Select “Add a Draw”.



3. The Request Date will automatically populate. In the “Description” field enter the timeframe of your request (e.g. June 2020 Expenses).
4. Select “Add”.



5. Select "Upload" and choose the file from your computer.
6. Enter the correct amount in the "Amount Requested" field.
7. Click out of box to make sure the correct amount shows in the "Totals" field.
8. Select "Submit".

Draw Requests > Draw Id: 56

Status: Not Submitted
 Date Requested: 7/22/2020
 Amount Requested: \$0.00
 Amount Approved: \$0.00

Request: Workflow 0 of 3

****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 DOCUMENTATION

June 2020 Expenses 5 Upload File

****ACTION REQUIRED:**** This draw request has NOT yet been submitted. Request will be denied if appropriate supporting documentation is not attached.

DETAILS

CATEGORY	ORIGINAL AMOUNT	- OTHER DISBURSEMENTS	AMOUNT REQUESTED
Other	\$ 30,000.00	\$ 0.00	\$ 0.00
Test Funding			\$ 0.00
Totals	\$ 30,000.00	\$ 0.00	\$ 0.00

6 7

Last updated by ccampbell@meridianscity.org on 7/22/2020 11:41:44 AM

8 Submit

9. On the pop-up select "Proceed" if the amount is correct. If not, select "Cancel" and correct the amount.

CONFIRM

You are submitting this draw for \$12,000.00. Proceed?

9 x Cancel Proceed

STATUS OF DRAW REQUEST

AFTER SUBMITTING A REQUEST IT IS POSSIBLE TO CHECK ON THE STATUS. BELOW WILL SHOW WHERE TO VIEW THE STATUS AS WELL AS THE MEANING OF THE STATUS.

1. From the left-hand navigation pane select the “Draw Requests” tab. The system will take you to an overview of the budget.

ID	CATEGORY	FUNDING	AMOUNT	DISBURSED	REMAINING
40	Direct Client Services (Staff Time)	Test Funding	\$50,000.00	\$0.00	\$50,000.00
39	Other	Test Funding	\$30,000.00	\$12,000.00	\$18,000.00

2. The status will tell where the request is in the process:

- Submitted – request has been submitted and is awaiting review by CDBG staff
- Pending Approval – request has been approved by CDBG staff and is awaiting Department approval
- Approved – request has been approved by the Department and has been sent to Finance for final review before being submitted to Council
- Disbursed – request has been approved by Council and the payment is being processed or has already been paid

ID	STATUS	WORKFLOW	DETAILS	REQUESTED DATE	REQUESTED AMOUNT	DISBURSED DATE	DISBURSED AMOUNT
56	Submitted	0 of 3	June 2020 Expenses	7/22/2020	\$12,000.00	N/A	N/A

APPLICATION

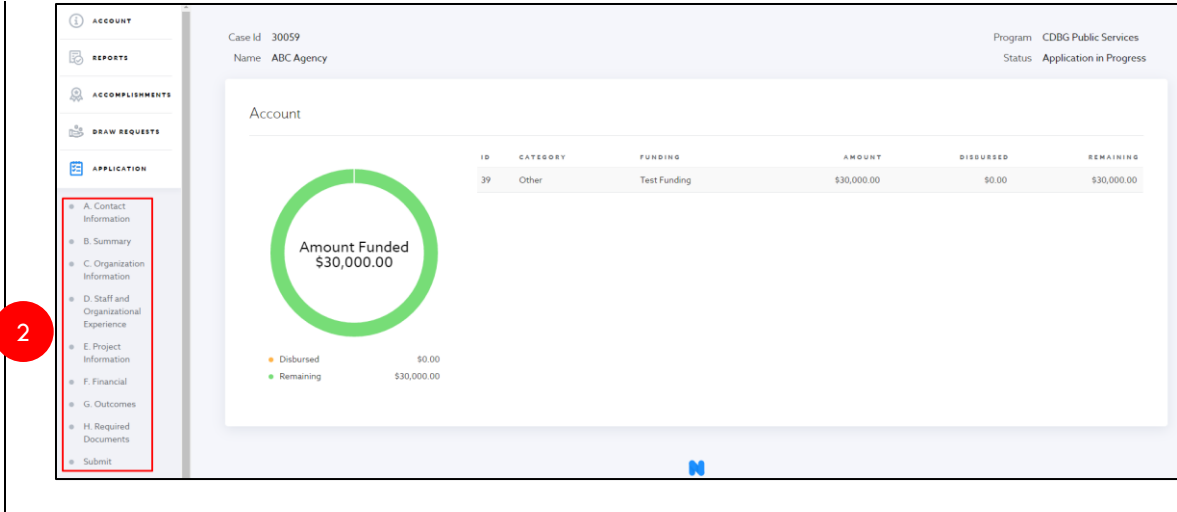
THIS SECTION WILL PROVIDE INFORMATION ON VIEWING THE APPLICATION FOR THE ASSOCIATED GRANT.

- 1. From the left-hand navigation pane click on the "Application" tab.

The screenshot displays the 'APPLICATION' tab in the software interface. On the left-hand navigation pane, the 'APPLICATION' tab is highlighted with a red box, and a red circle with the number '1' is placed next to it. The main content area shows account details for Case Id 30059, Name ABC Agency, Program CDBG Public Services, and Status Application in Progress. It features a donut chart for 'Amount Funded \$30,000.00' and a table with one row of funding data.

ID	CATEGORY	FUNDING	AMOUNT	DISBURSED	REMAINING
39	Other	Test Funding	\$30,000.00	\$0.00	\$30,000.00

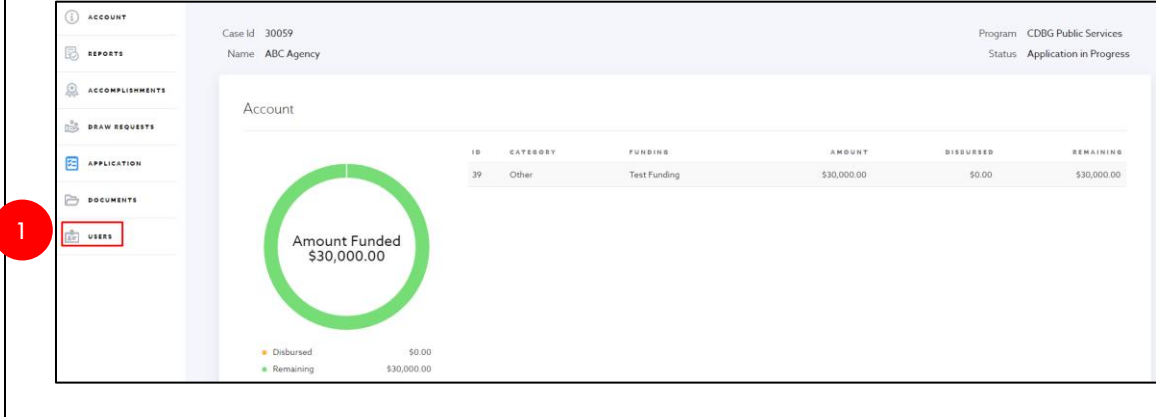
- 2. Select the section you would like to view from the left-hand navigation pane to view that section of the application.



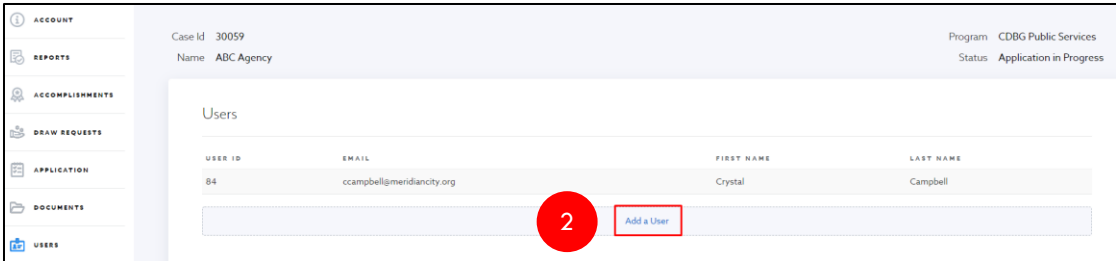
USERS

THIS SECTION WILL SHOW HOW TO ADD AN ADDITIONAL PERSON TO A PROJECT. ADDING USERS WILL ALLOW: MULTIPLE PEOPLE TO COLLABORATE ON AN APPLICATION, FINANCIAL PERSON TO COMPLETE A REIMBURSEMENT REQUEST, ABILITY TO ASSIGN TASKS, ETC. NOTE: CITY STAFF MAY BE INCLUDED IN THE "USERS" LIST SO THEY ARE ABLE TO VIEW THE PROJECT FROM YOUR PERSPECTIVE AND PROVIDE TECHNICAL ASSISTANCE.

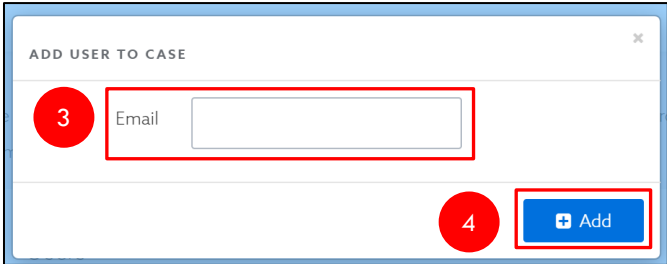
- 1. From the left-hand navigation pane select the "Users" tab.



2. Select the "Add a User" button.



3. In the pop-up box, enter the email address.
4. Select the "Add" button.



NEED HELP?

Contact Crystal Campbell at ccampbell@meridianscity.org or (208) 489-0575.