Homeowner Repair Software Guide

Meridian CDBG Program

This guidance document provides subrecipients administering the Homeowner Repair Program with guidance on utilizing Neighborly Software to manage the program.

CONTENTS

Application Status

The following are potential statuses and their definitions.

Application in Progress

Applicant is currently working on application.

This status is automatically created by the system.

Application Submitted

Applicant has submitted the application.

This status is automatically created by the system.

Meets Basic Eligibility

The application has been reviewed and it meets basic eligibility according to the checklist.

Subrecipient must assign this status.

Active

Subrecipient has evaluated the project and decided to move forward.

Subrecipient must assign this status.

Closed

Subrecipient has completed all repairs and collected all required documentation.

Subrecipient must assign this status.

Denied

The project has been determined ineligible at any point in the process.

Subrecipient must assign this status.

Incomplete

The application has not been completed within 30 days.

Subrecipient must assign this status.

Withdrawn

The applicant no longer wants to move forward.

Subrecipient must assign this status.

Actionable Statuses

The following are statuses that have an action attached.

01 Application in Progress

Review the system regularly to view the status of applications in progress. If it appears as though an applicant is stuck, reach out to them to see if they need assistance.

If it has been longer than 30 days since the applicant has worked on the application, update to an inactive status. Applicants can contact you to re-open their application.

Update the status as appropriate.

02 Application Submitted

Use the Housing Inspection to evaluate the application. If project is eligible, email the applicant a Letter of Approval. If the project is ineligible, email the applicant a Denial Letter. Upload the determination letter to the Prescreen section of the checklist and mark as complete.

Update the status as appropriate.

03 Meets Basic Eligibility

Schedule an appointment to conduct an onsite visit to review the Housing Inspection. If the project is viable and fits within your policies and procedures, email Meridian CDBG staff to request an environmental review be completed. Include the FEMA Flood Map.

Update the status as appropriate.

04 Active

No construction can occur on this project until the Environmental Review is complete. City staff will upload the final to the Environmental Review to the checklist and email the subrecipient.

Complete the project per agency processes and upload all necessary documentation, completing the checklist throughout the process. When the checklist is complete select "Complete & Continue".

Update the status to closed.

Updating the Status

It is necessary to manually update the status of the application once it has been submitted or to mark it as inactive.
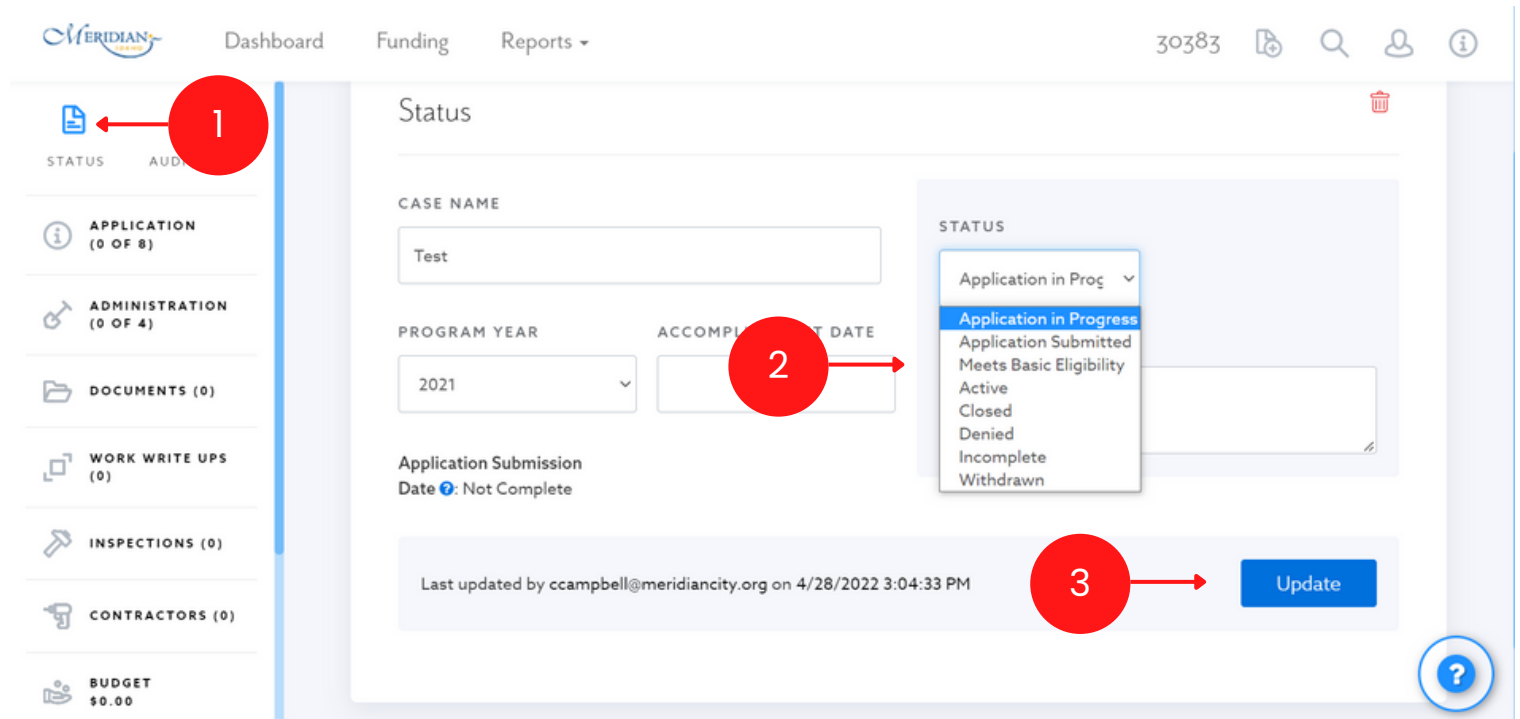
1. Select "Status" from the left-hand navigation pane.
2. Select the correct status from the "Status" drop-down menu.
3. Select "Update".

Rendered Documents

Neighborly can generate individualized documents from a standard template to assist with activities such as sending approval or denial letters. For the full instructions view the User Guide in Neighborly.

Contact the City if you would like assistance configuring the rendered documents.

1. Select the information icon.
2. Under "User Guides" select "Configuration" to expand the menu.
3. View the "Configuring Rendered Document Templates" guide.

Approval Letter

If the application meets the basic eligibility the applicant must be notified. The system can generate an approval letter if it has been configured.
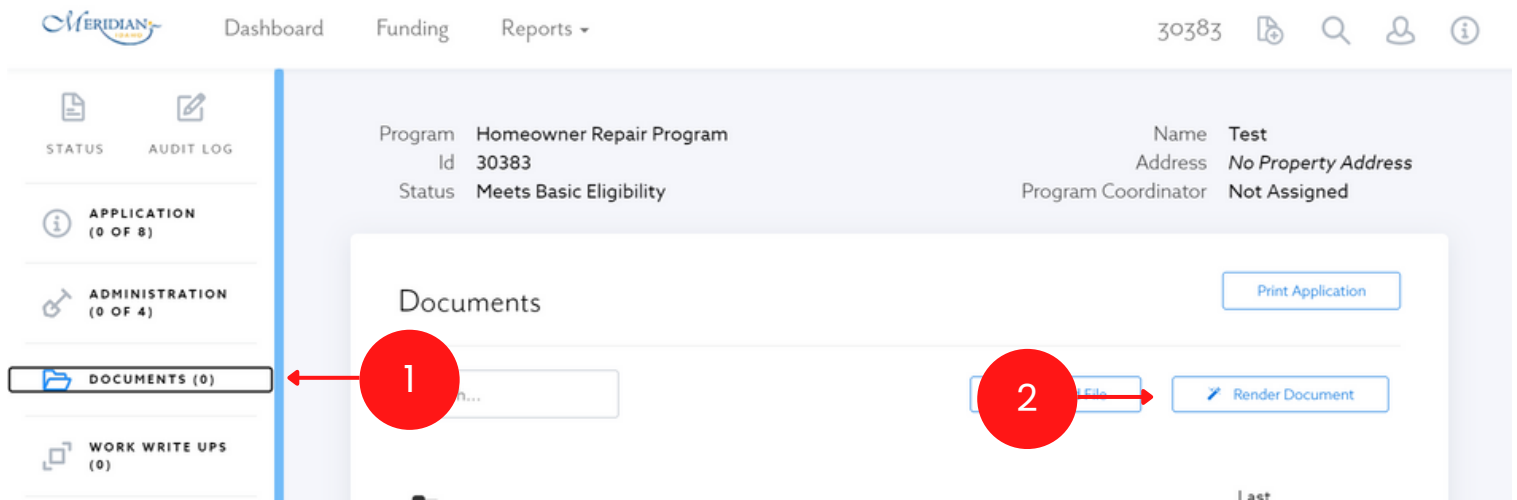
1. Select "Documents" from the left-hand navigation pane.
2. Select "Render Document".
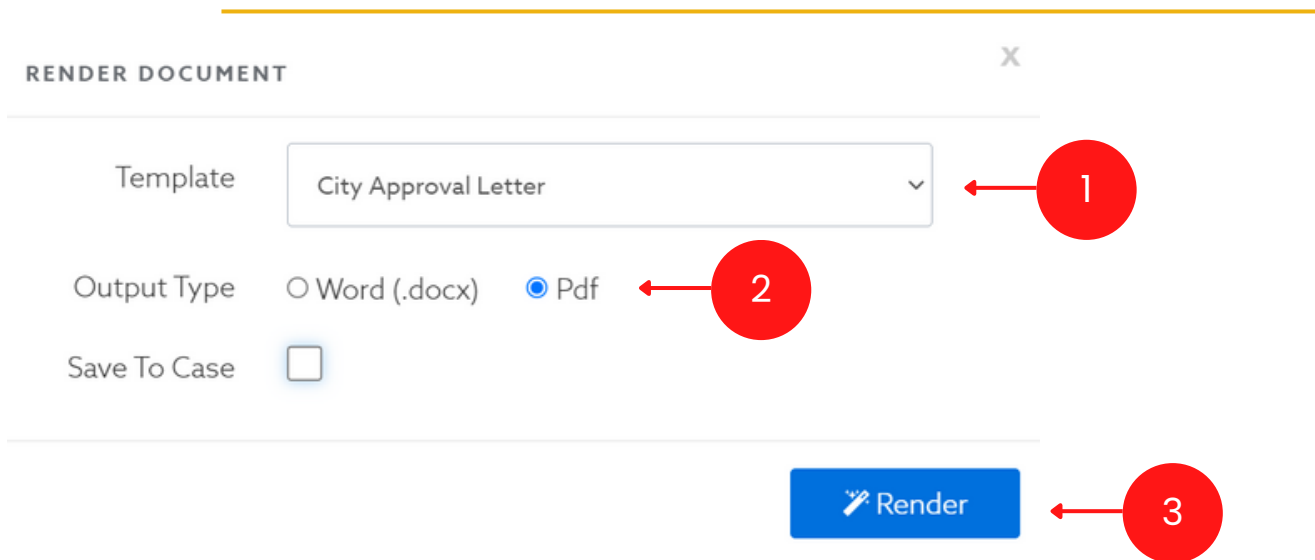
1. Select "Approval Letter" from the Template drop-down menu..
2. Select "PDF". *Note: If the font for the signature does not transfer, you mayhave to download as a Word document and save it as a PDF.*
3. Select "Render".

Email letter to the contact person listed on the application and upload a copy of the letter to the Homeowner Repair Checklist.

Denial Letter

If the application is denied at any point throughout the process, the applicant must be notified. The system can generate a denial letter if it has been configured.

1. Select "Administration" from the left-hand navigation pane.
2. Select "Denial Reason" from the left-hand navigation pane.
3. Enter the reason for the denial in the appropriate text box.
4. Select "Save".

Denial Letter, cont.

1. Select "Documents" from the left-hand navigation pane.
2. Select "Render Document".

1. Select "Denial Letter" from the Template drop-down menu.
2. Select "PDF". *Note: If the font for the signature does not transfer, you may have to download as a Word document and save it as a PDF.*
3. Select "Render".

Email letter to the contact person listed on the application and upload a copy of the letter to the Homeowner Repair Checklist.

Housing Inspection

The Housing Inspection is completed once the basic eligibility requirements have been met. This will determine if this is an allowable project and provides a scope of work.

1. Select "Inspections" from the left-hand navigation menu.
2. Select the option to create a new inspection.

1. Add the appropriate number of rooms in the home.
2. Select "Save".
3. Update fields and upload images/files as needed. Select "Save" when complete.

Final Inspection

A Final Inspection is required to complete the project. Review Neighborly's User Guide for instructions on completing the Final Inspection.
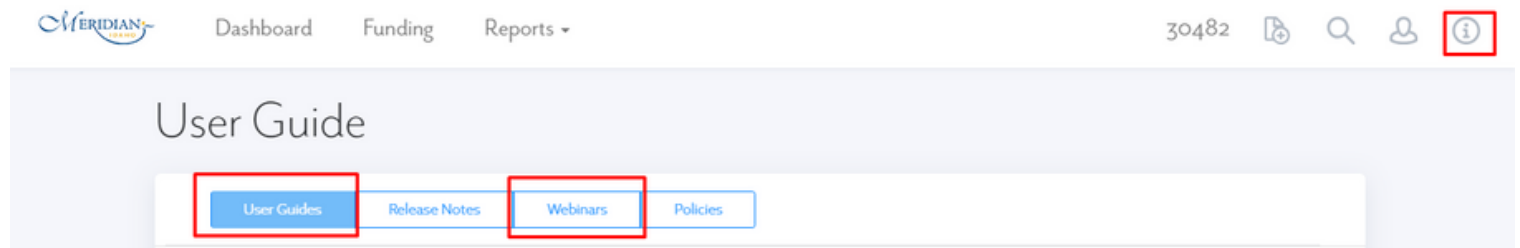

1. Select the information icon.
2. Under "User Guides" select "Configuration" to expand the menu.
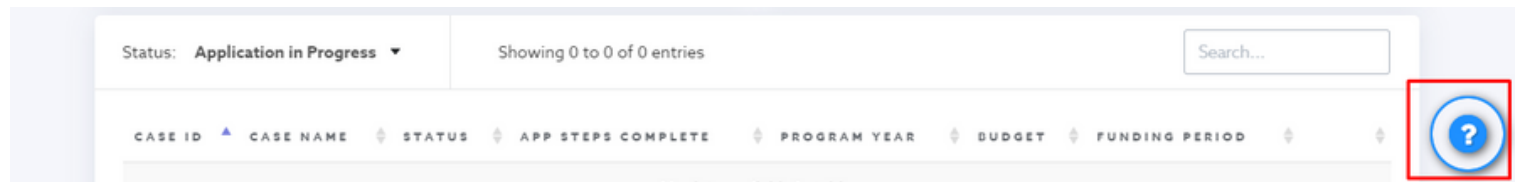3. View the "Creating a Reinspection" guide.

Additional Resources

The following resources are available.

Neighborly User Guides/Webinars

Neighborly Help Desk

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