

# 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.

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# 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## Withdrawn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.

## 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.

## 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.

## 04 Active

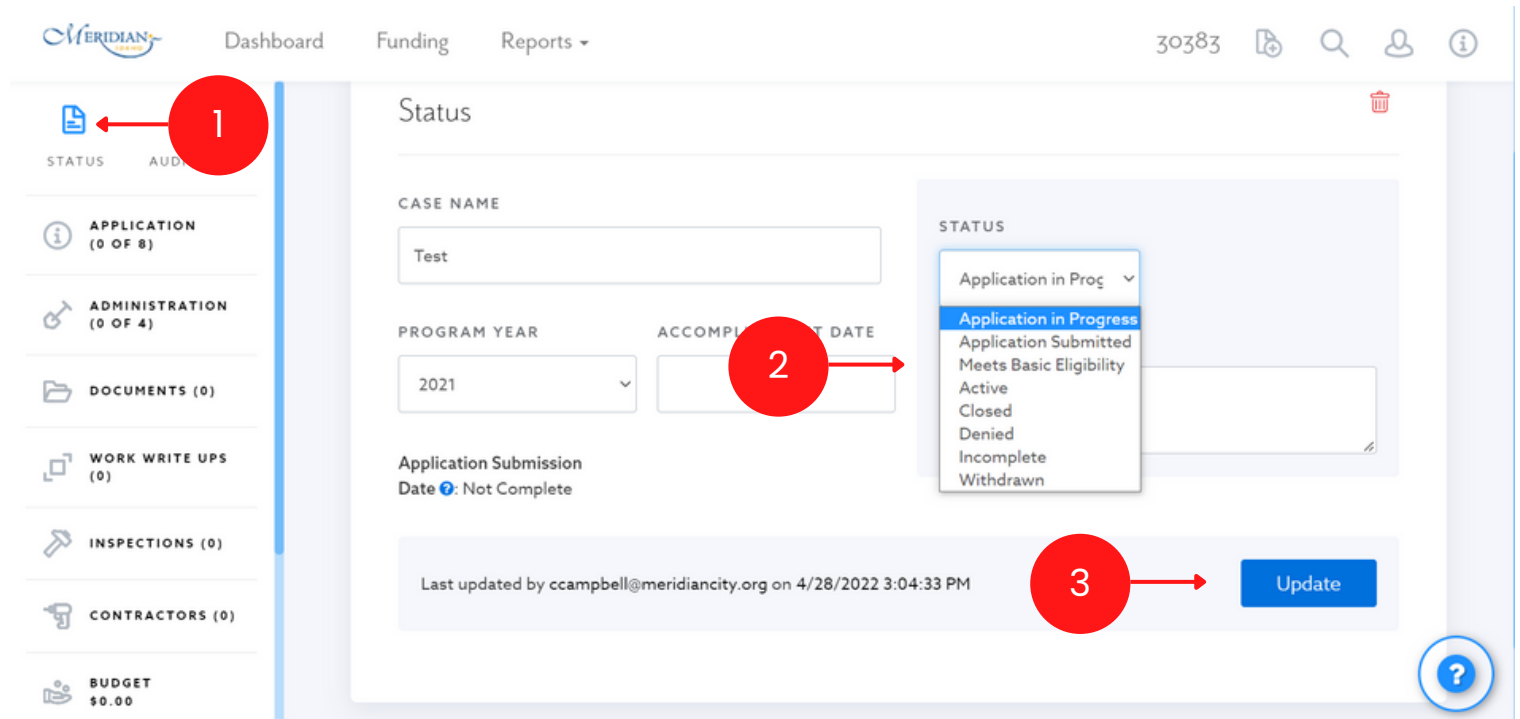
**No construction can occur on this project until the Environmental Review is complete.** City staff will upload the final to the Environmental Review to the checklist and email the subrecipient.

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.

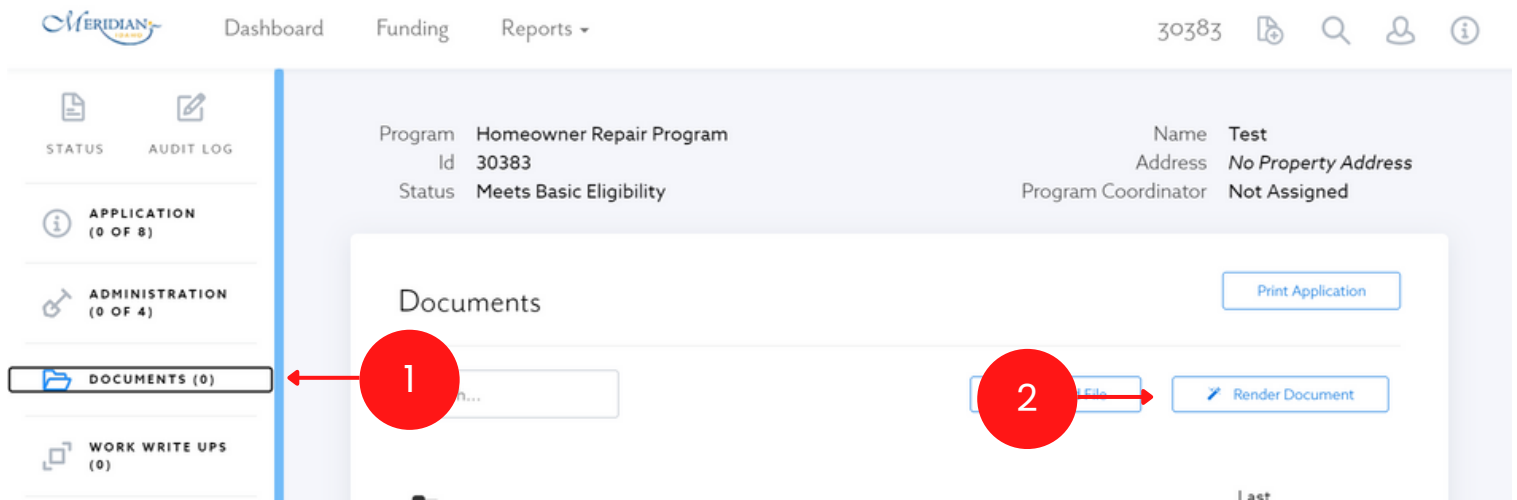
Contact the City if you would like assistance configuring the rendered documents.

The screenshot shows the Neighborly user interface. At the top left is the Meridian logo. The navigation menu includes 'Dashboard', 'Funding', and 'Reports'. In the top right corner, there is a red circle with the number 1 pointing to an information icon. Below the navigation is a 'User Guide' section. Under 'User Guides', there are tabs for 'User Guides', 'Release Notes', 'Webinars', and 'Policies'. The 'User Guides' tab is selected, showing a list of guides for 'Housing Choice Vouchers (HCV)'. A red circle with the number 2 points to the 'Configuration' section. Under 'Configuration', there are three guides: 'Program Years', 'Configuring Rendered Document Templates', and 'Display (LabelOnly) Fields'. A red circle with the number 3 points to the 'Configuring Rendered Document Templates' guide.

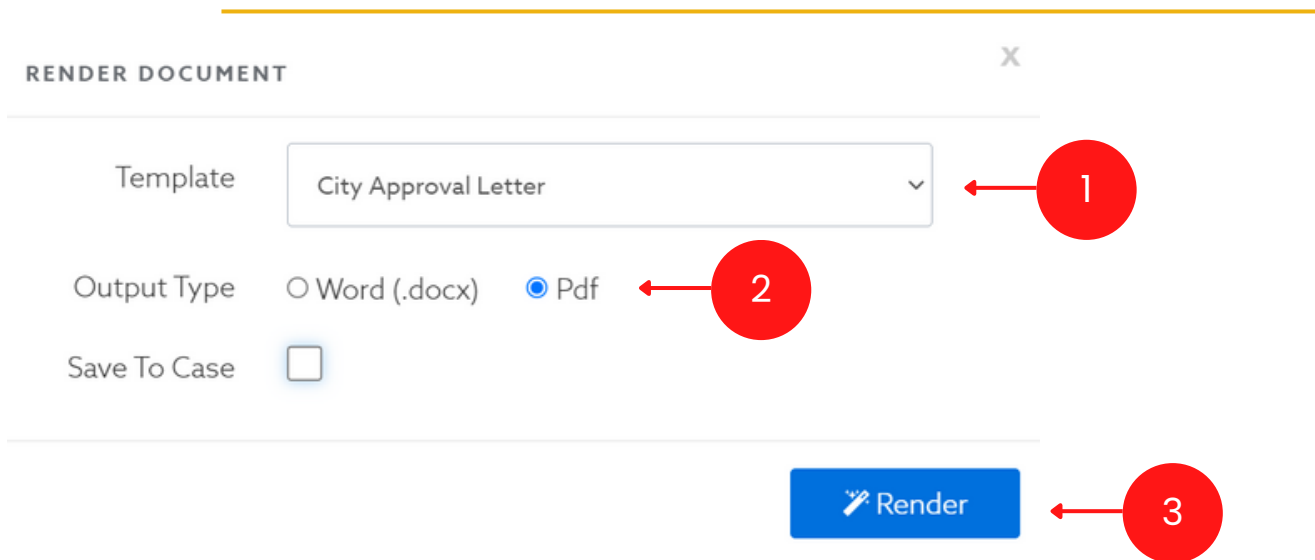
1. Select the information icon.
2. Under "User Guides" select "Configuration" to expand the menu.
3. View the "Configuring Rendered Document Templates" guide.

# 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 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.

# 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.

The screenshot shows the Meridian Homeowner Repair Program software interface. The top navigation bar includes 'Dashboard', 'Funding', and 'Reports'. The left-hand navigation pane has 'STATUS', 'AUDIT LOG', 'APPLICATION (0 OF 8)', 'ADMINISTRATION (0 OF 4)', 'DOCUMENTS (0)', and 'WORK WRITE UPS (0)'. The 'ADMINISTRATION' section is expanded, showing 'Denial Reason\*', 'Additional Documentation', 'Checklist', and 'Onsite Monitor Preliminary Review'. The 'Denial Reason' form is active, displaying 'Program Homeowner Repair Program', 'Id 30482', 'Status Application in Progress', 'Name PY23 Test', 'Address No Property Address', and 'Program Coordinator Not Assigned'. The form includes a 'Reason for Denial' text box and 'Save' and 'Complete & Continue' buttons. Red circles with numbers 1-4 indicate the steps: 1. Select 'Administration', 2. Select 'Denial Reason', 3. Enter the reason in the text box, and 4. Select 'Save'.

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".

Continued on next page.



# Denial Letter, cont.

The screenshot shows the Meridian software interface. At the top, there is a navigation bar with 'Dashboard', 'Funding', and 'Reports'. The user ID '30383' is displayed. The main content area shows details for a 'Homeowner Repair Program' with ID '30383' and status 'Meets Basic Eligibility'. The 'Documents' section is highlighted, and the 'Render Document' button is also highlighted. Red circles and arrows indicate the steps: 1. Select 'Documents' from the left-hand navigation pane. 2. Select 'Render Document'.

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

## RENDER DOCUMENT

The screenshot shows the 'RENDER DOCUMENT' dialog box. The 'Template' dropdown menu is set to 'City Denial Letter'. The 'Output Type' radio buttons are set to 'Pdf'. The 'Render' button is highlighted. Red circles and arrows indicate the steps: 1. Select 'Denial Letter' from the Template drop-down menu. 2. Select 'PDF'. 3. Select 'Render'.

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.

The screenshot shows the Meridian software interface. The top navigation bar includes 'Dashboard', 'Funding', and 'Reports'. The user ID '30482' is visible. The main content area displays program details for 'Homeowner Repair Program' (Id: 30482, Status: Application in Progress) and property information (Name: PY23 Test, Address: No Property Address, Program Coordinator: Not Assigned). The 'Inspections' section is highlighted, showing a table with columns: NAME, ASSIGNED TO, DUE DATE, STATUS, COMPLETED BY, and ACTIONS. A red circle with the number '1' points to the 'INSPECTIONS (0)' link in the left-hand navigation menu. A red circle with the number '2' points to the 'Click here to create a new inspection' link in the main content area.

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

The screenshot shows the 'INSPECTION SETTINGS' form. The form includes fields for Name (Test), Assigned To, Due Date, and Status (Pending). Below these are sections for adding rooms: Living Room, Kitchen, Bathroom, Bedroom, Secondary Rooms, Building Exterior, Heating and Plumbing, and General Health and Safety. Each room section has a counter and a plus sign. A 'Save' button is at the bottom right.

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.

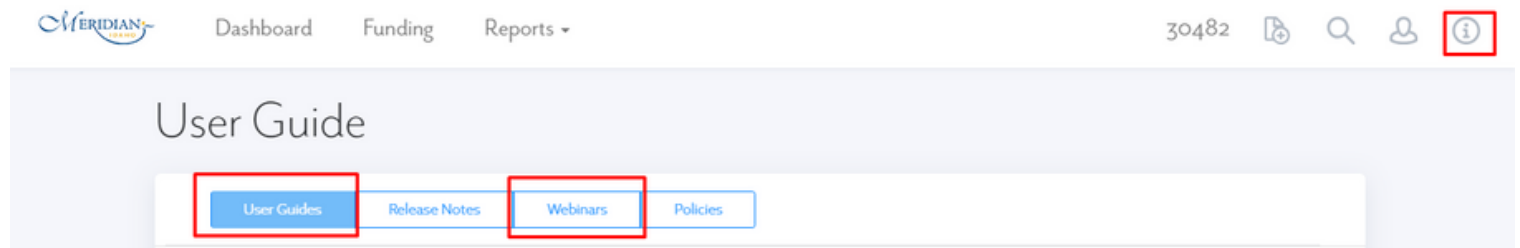
The screenshot shows the Neighborly User Guide interface. At the top left is the Meridian logo. The navigation menu includes Dashboard, Funding, and Reports. In the top right corner, a red circle with the number '1' points to an information icon. The main content area is titled 'User Guide' and features a tabbed interface with 'User Guides', 'Release Notes', 'Webinars', and 'Policies'. Under 'User Guides', there are sections for 'Housing Choice Vouchers (HCV)', 'Configuration', 'Administrator', and 'Loans'. The 'Configuration' section is expanded, showing a sub-menu with 'Construction' highlighted. A red circle with the number '2' points to the 'Construction' sub-menu. Under 'Construction', there are three items: 'Creating a Reinspection', 'Contractor Management', and 'Contractor Registration'. A red circle with the number '3' points to the 'Creating a Reinspection' item. Each item in the sub-menu has a video icon on the right.

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

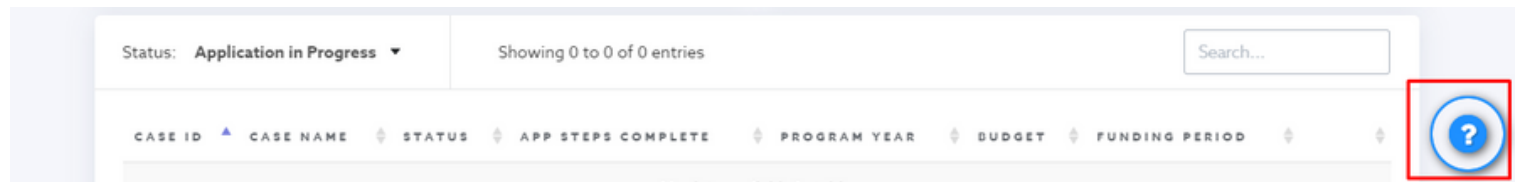
# Additional Resources

The following resources are available.

## Neighborly User Guides/Webinars



## Neighborly Help Desk



- Confirmation Email
- Password Reset
- Error Message
- Account Locked
- Update User Permissions
- Configuration
- Other

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