

## Genesee County Community Development Program

### Neighborly Software User Guide

Genesee County Metropolitan Planning Commission

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**GENESEE COUNTY**  
METROPOLITAN PLANNING  
COMMISSION

 Neighborly Software

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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/GENESEECOUNTYMI/Participant>

 <p><b>GENESEEE COUNTY</b> METROPOLITAN PLANNING COMMISSION</p> <p>Welcome to the Genesee County Participant Portal.</p> <p>New users must first register their account before signing in to the portal.</p> <p>Technical issues email: <a href="mailto:support@neighborlysoftware.com">support@neighborlysoftware.com</a></p>	<p><a href="#">Sign In</a>      <a href="#">Register</a></p> <p>Email Address <input type="text"/></p> <p>Password <input type="password"/></p> <p><input type="checkbox"/> Remember my email address</p> <p><input type="button" value="Sign In"/></p> <p><a href="#">Forgot your Password?</a></p>
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## 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 username (which is your work email address) and password that will be used for future logins. The email address you choose will also be used for system emails/notifications. 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.

Sign In      Register

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Email Address

Re-enter Email Address

First Name

Last Name

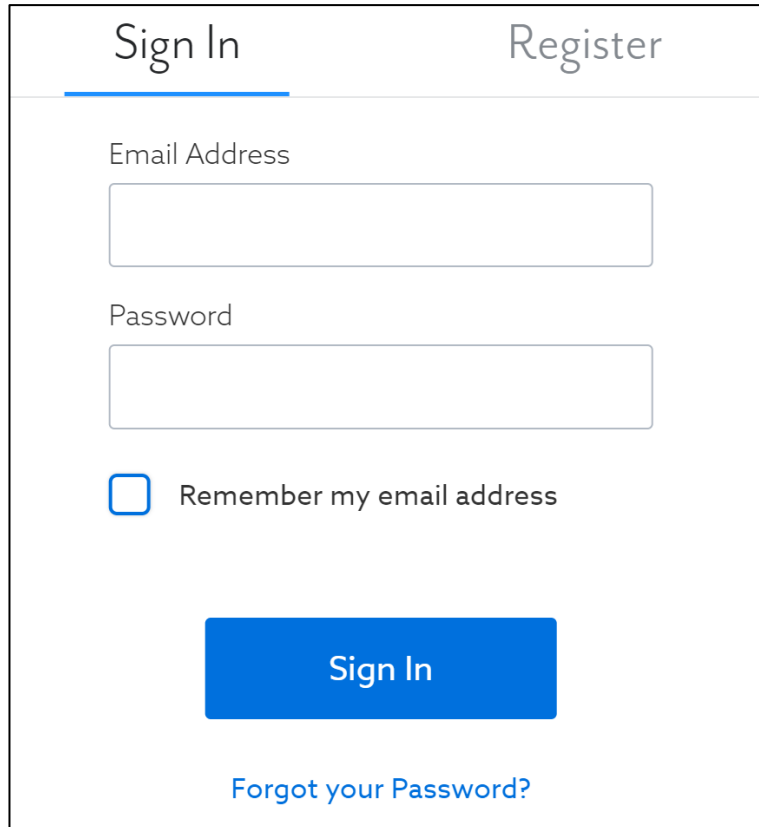
Password

Re-enter Password

[Continue](#)

## Logging In

Once your account has been registered, you may login to the portal 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).




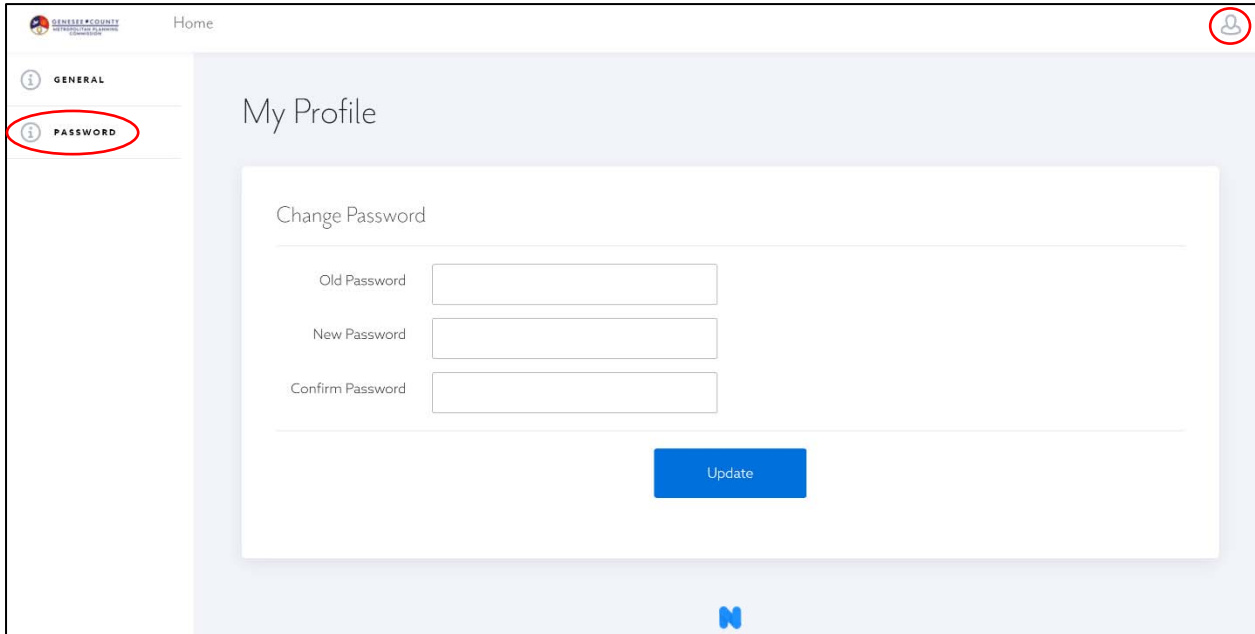
The image shows a web form with two tabs: "Sign In" (active) and "Register". Below the tabs are two input fields: "Email Address" and "Password". Below the "Password" field is a checkbox labeled "Remember my email address". At the bottom of the form is a blue "Sign In" button and a link that says "Forgot 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.

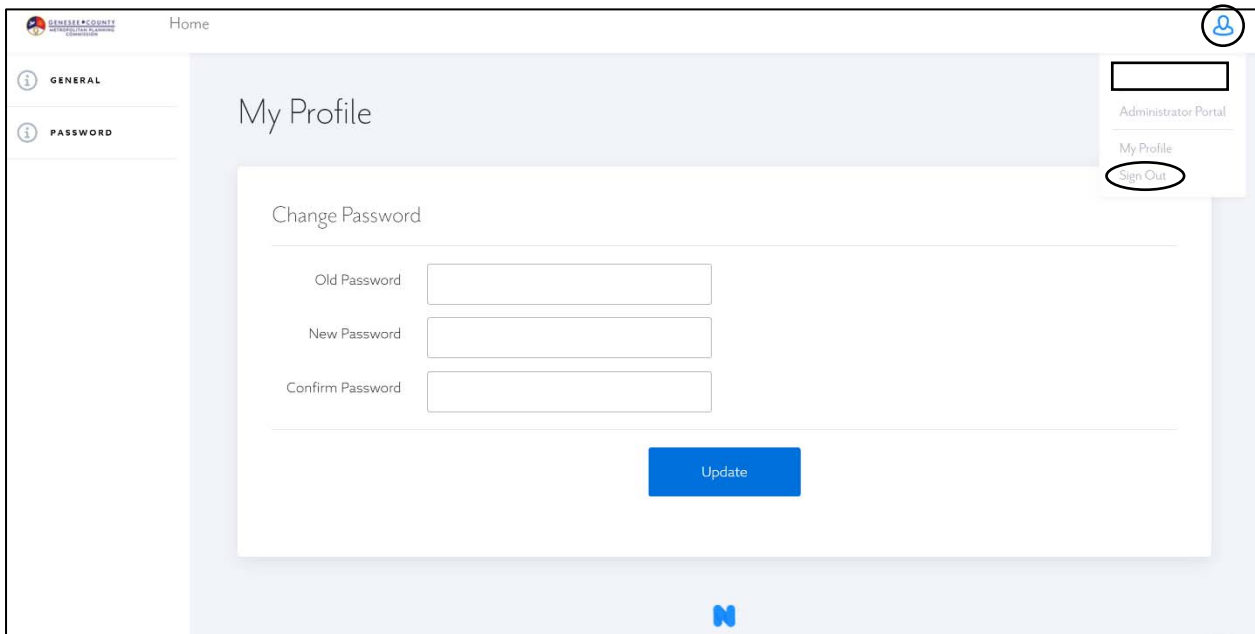
## Changing your Password

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.



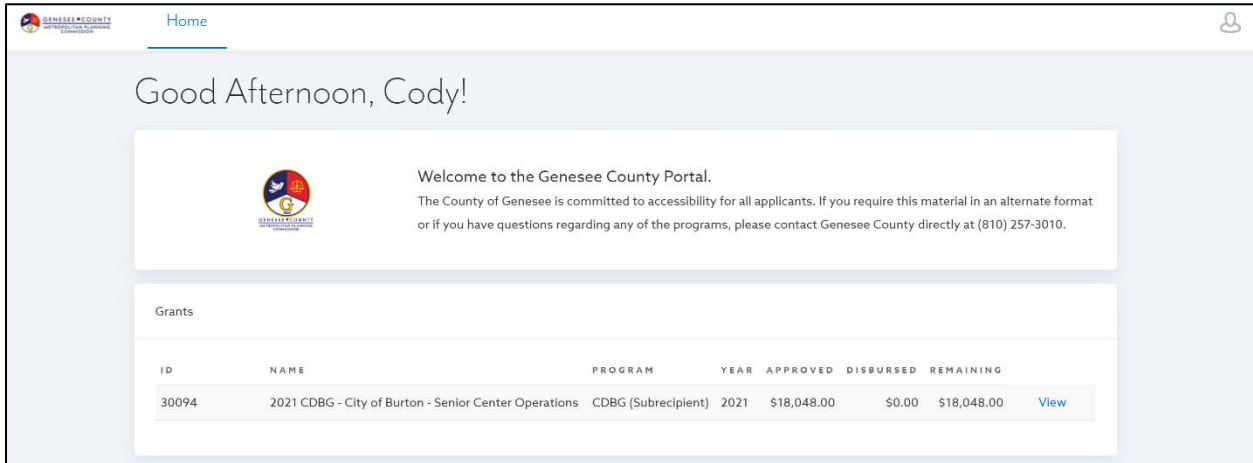
## Signing Out

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".

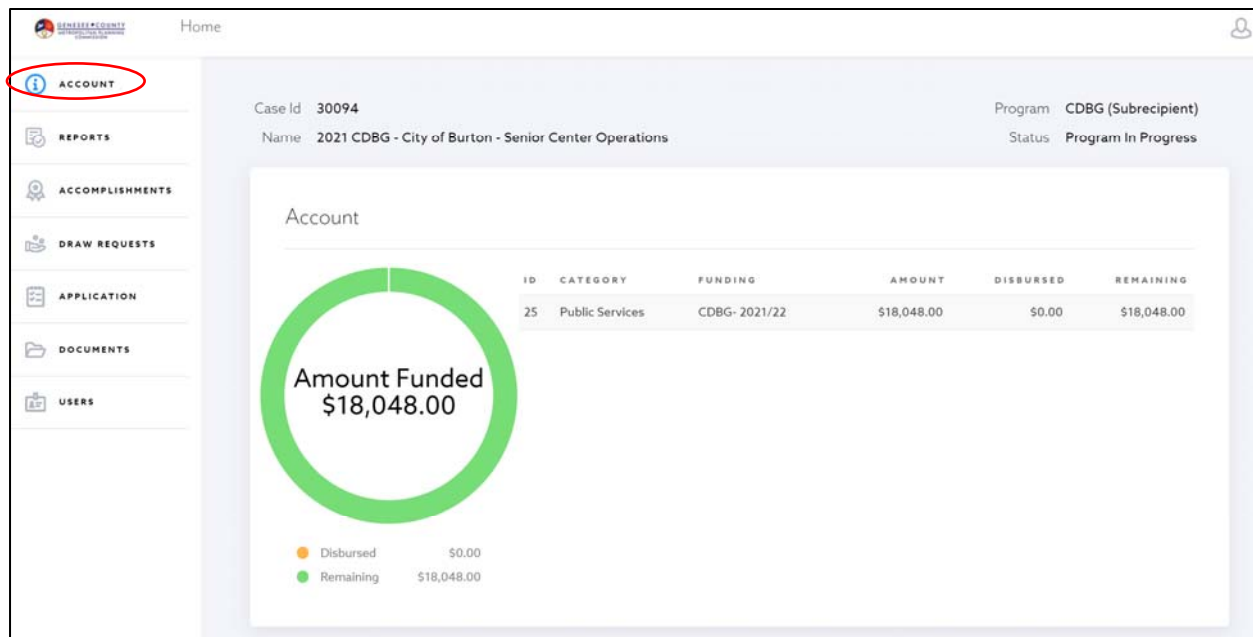


## Managing your Grant Account

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



Once loaded, you'll see the Grant account screen has 6 tabs: Account, Reports, Accomplishments, Draw Requests, Application and Documents. The Account screen is a summary of your Grant account, including the award amount, the funds disbursed, and the remaining account balance.



The Accomplishments screen provides a summary of accomplishments data entered via Quarterly Reports. Note that this screen is Read Only. Accomplishment data can only be

added or modified via the Reports tab. Also note the scroll bar at the bottom of each section of Accomplishments to view multiple months.

Case Id 30094  
Name 2021 CDBG - City of Burton - Senior Center Operations  
Program CDBG (Subrecipient)  
Status Program In Progress

### Accomplishments

Accomplishment data below is read-only. Changes must be made to the corresponding report.

BENEFICIARIES - RACE/ETHNICITY	TOTAL
White - Hispanic	0
White - Non-Hispanic	0
Black/African American - Hispanic	0
Black/African American - Non-Hispanic	0
Asian - Hispanic	0
Asian - Non-Hispanic	0
American Indian/Alaskan Native - Hispanic	0
American Indian/Alaskan Native - Non-Hispanic	0
Native Hawaiian/Other Pacific Islander - Hispanic	0

## Submitting a Draw Request

From the Home Page, select the grant in which you are requesting reimbursement for. Next, click "Draw Requests" on the left side of the screen. Now click "Add a Draw" as shown below:

### Draw Requests

Requested \$2,120.47

ID	STATUS	WORKFLOW	DETAILS	REQUESTED DATE	REQUESTED AMOUNT	DISBURSED DATE	DISBURSED AMOUNT
6	Disbursed	4 of 4	August 2021 Salary & Fringe Benefits	9/9/2021	\$2,120.47	10/15/2021	\$2,120.47

[Add a Draw](#)

- Disbursed \$2,120.47
- Pending \$0.00
- Short Paid \$0.00



Next, enter a brief description of the expenses being requested, the amount requested, and upload all required documentation related to the request.

## Checking the Status of a Draw Request

From the Draw Request screen, click on a previous draw request to view more details. You should see “Status” indicating whether a request has been approved and disbursed, or if more information is being requested by staff. You can track the draw request review process by clicking on the “Workflow” tab.

Draw Requests > Draw Id: 6

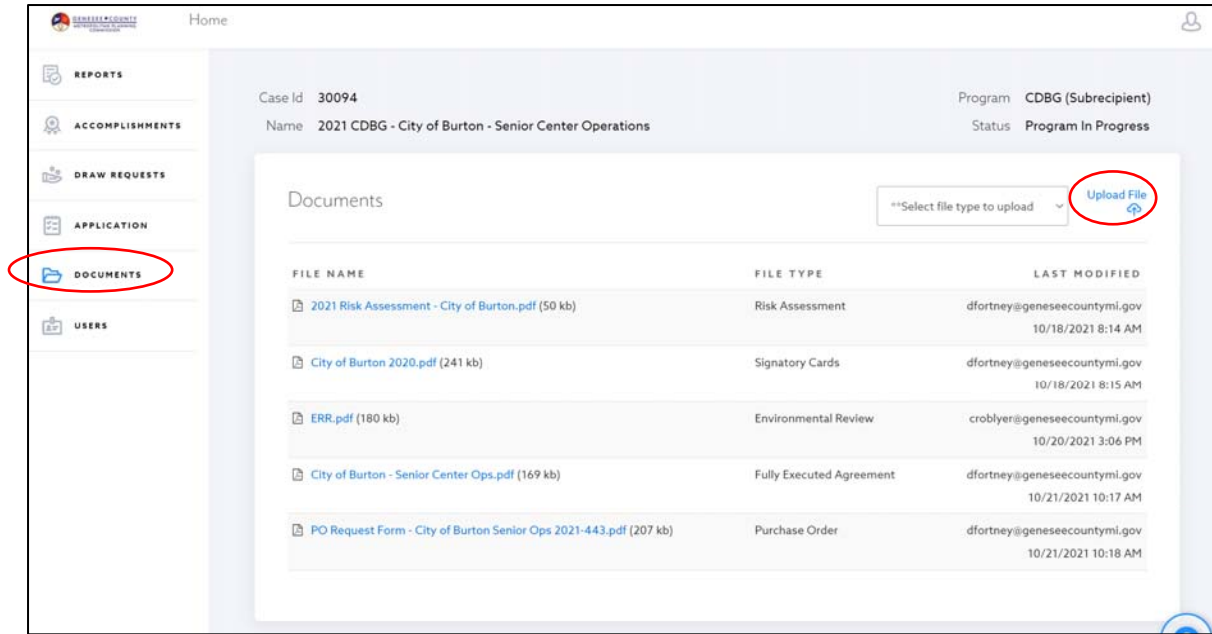
Status	Disbursed	Amount Requested	\$2,120.47
Date Requested	9/9/2021	Amount Disbursed	\$2,120.47

Request Workflow 4 of 4

ACTIVITY	DATE COMPLETED	COMPLETED BY
Planner Review	10/14/2021 3:08:15 PM	akelly1@geneseecountymi.gov
Division Manager Approval	10/15/2021 8:53:27 AM	staylor2@geneseecountymi.gov
Director Approval	10/15/2021 9:14:42 AM	cdurgan@geneseecountymi.gov
Accountant Approval	10/15/2021 9:24:23 AM	vbarker@geneseecountymi.gov

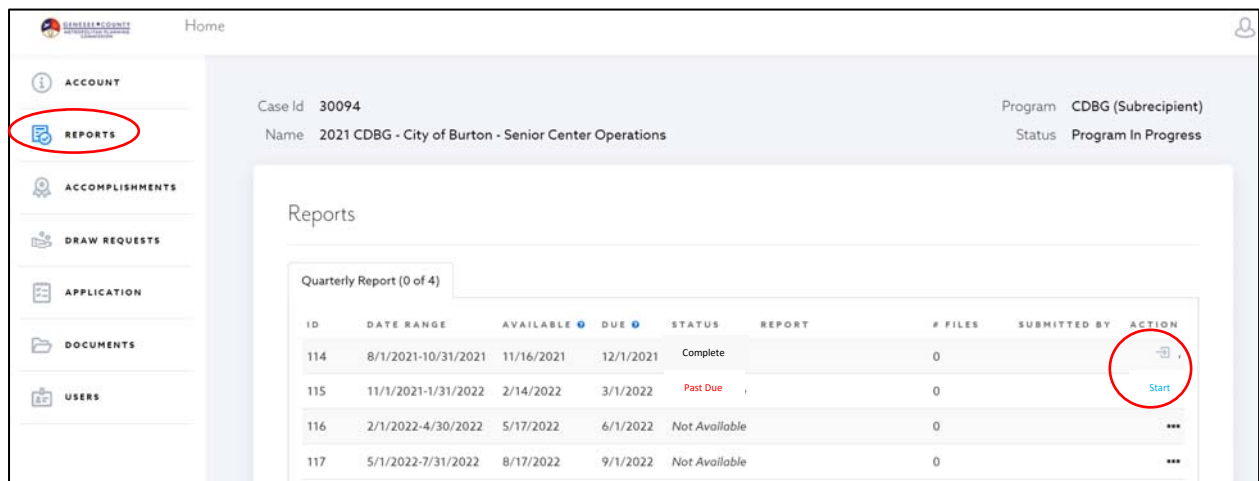
## Viewing and Uploading Documents


From the Documents screen, you can view project documents that have been uploaded by GCMPC. You are also able to upload additional files that may be requested by clicking “Upload File” in the upper right corner of the screen.



## Completing Accomplishment Reports

The Reports tab will indicate if any reports are Due or Past Due. Once you click into the Reports section, you will see a summary of reports, including tabs for Quarterly 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 report period has ended.

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, Accomplishment data, and to certify and submit. Complete each tab by clicking the "Complete and Continue" link at the bottom of the screen.

## Adding Users

From the Users screen, by clicking "Add a User", you can add additional users from your agency to the project. This will allow them to add or view information for that project.

