

Subrecipient User Guide:

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BENEVATE, INC.
DBA NEIGHBORLY SOFTWARE



Neighborly Software

www.NeighborlySoftware.com

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Accessing Participant Portal

You can use the Participant Portal on any device connected to the internet. We recommend Google Chrome, but other modern web browsers will work too.

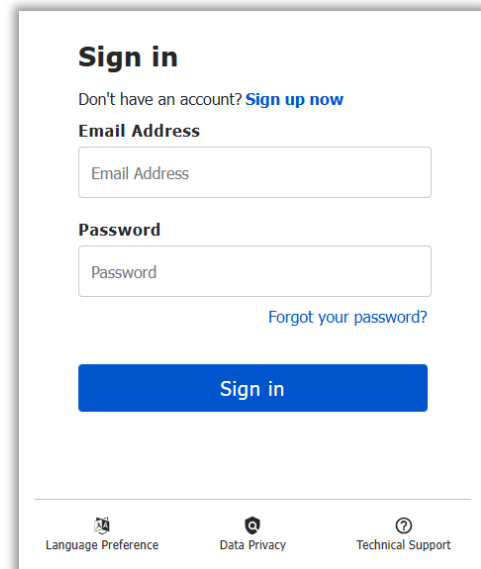
Participant Portal Link: <https://portal.neighborlysoftware.com/tenantname/Participant>

*please get the exact URL from your program administrator.

Registration

To create an account, register your email address. Select "Sign up now" and enter your email. Then select "Send verification code." We'll email you a code to verify your address.

Note: If you don't get the email within 2 minutes, check your spam or junk folder. If you find it there, mark it "Not Junk" or "Not Spam." This helps make sure you get our emails in the future.



Sign in

Don't have an account? [Sign up now](#)

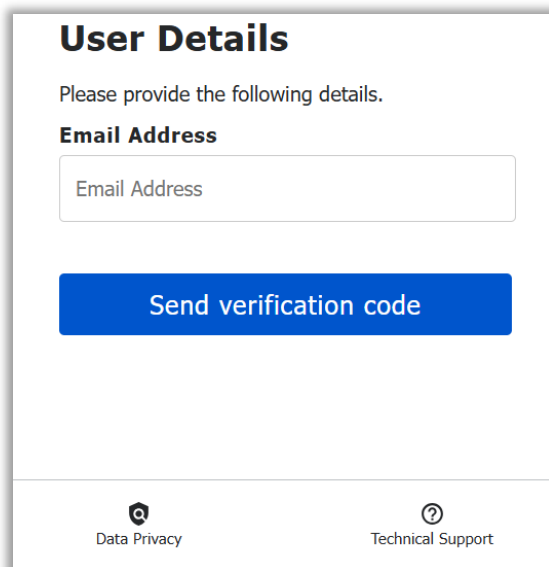
Email Address

Password

[Forgot your password?](#)

Sign in

[Language Preference](#) [Data Privacy](#) [Technical Support](#)



User Details

Please provide the following details.

Email Address

Send verification code

[Data Privacy](#) [Technical Support](#)

Enter your email address. We'll send a code to your inbox. Type the code into the box and select "Verify Code."

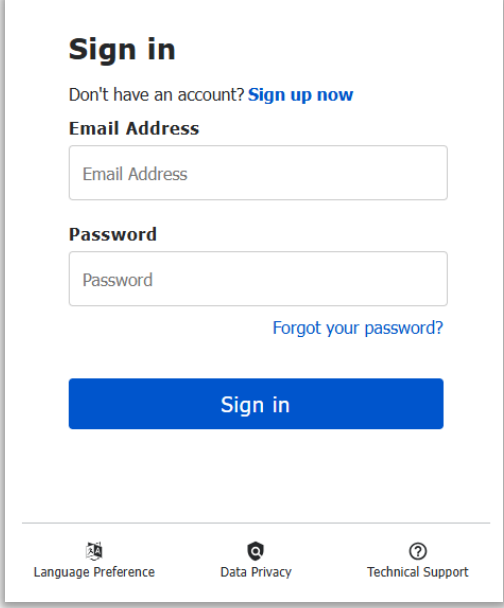
If the code doesn't work, select "Send new code." We'll email you a new one.

After you verify your email, create a password. Your password must have:

- At least 12 characters
- One UPPERCASE letter
- One lowercase letter
- One number
- One special character, like ! @ # \$ % ^

Signing In

Once you register, log in using the same link above. Enter the email address and password you used to sign up.



Sign in

Don't have an account? [Sign up now](#)

Email Address

Password

[Forgot your password?](#)

Sign in

 Language Preference  Data Privacy  Technical Support

Password Reset

If you forget your password, select “Forgot your Password?” Then follow the steps to create a new one.

Enter the email address you used to register. Then select “Send Verification Code.”

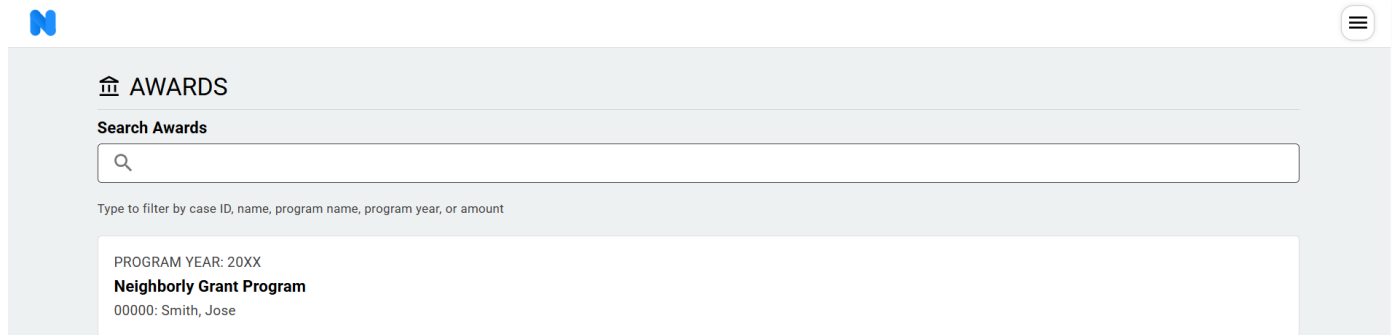
We’ll email you a 6-digit code within a few seconds. Enter the code and select “Verify Code.”

If you don’t get a code after 2 minutes, repeat these steps to get a new one.

Check your spam and junk folders before you request a new code. A common reason for not getting a code is a typo in your email address. Double-check that you typed it correctly.

Managing your Awards

After you log in, you'll see your dashboard. Any case with awarded funds appears in the Awards area, as shown below. Select a case to view its additional sections.



AWARDS

Search Awards

Type to filter by case ID, name, program name, program year, or amount

PROGRAM YEAR: 20XX
Neighborly Grant Program
00000: Smith, Jose

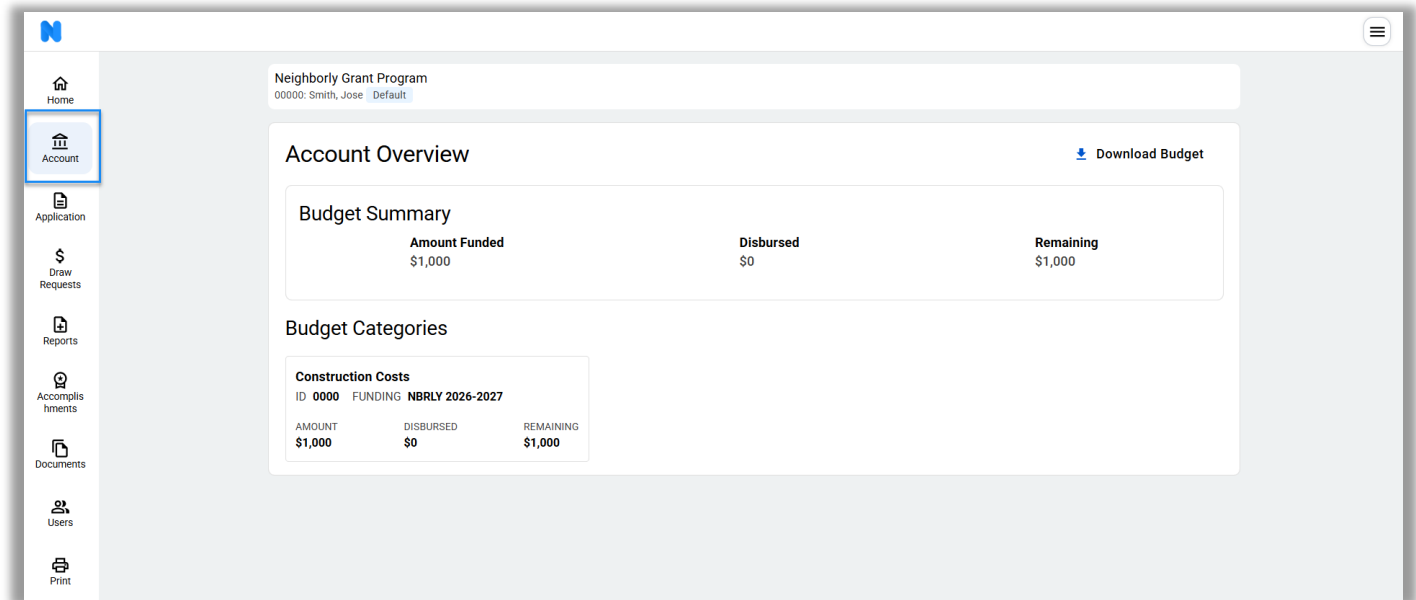
Case Details

Your case includes sections based on what's enabled for your program. Let's take a look at each:

 Home	Home – Return to the Participant Portal home screen at any time
 Account	Account – View your budget summary, categories, and amounts funded, disbursed, and remaining
 Application	Application – View the information you or your organization submitted to apply for funds
 Draw Requests	Draw Requests – Submit and review draw requests from your awarded amount
 Reports	Reports – View and submit reports for your case
 Accomplishments	Accomplishments – View a summary of the accomplishment data submitted in your reports
 Documents	Documents – Upload and view documents for your case
 Users	Users – Add other users to your case so they can view and help manage it
 Print	Print – Print specific steps in your application

Account Overview

The Account Overview screen is a summary of your awards, including the award amount, the funds disbursed, and the remaining account balance.



The screenshot shows the 'Account Overview' page for the 'Neighborly Grant Program'. The left sidebar contains navigation icons for Home, Account (highlighted), Application, Draw Requests, Reports, Accomplishments, Documents, Users, and Print. The main content area displays the following information:

Neighborly Grant Program
00000: Smith, Jose | Default

Account Overview [Download Budget](#)

Budget Summary

Amount Funded	Disbursed	Remaining
\$1,000	\$0	\$1,000

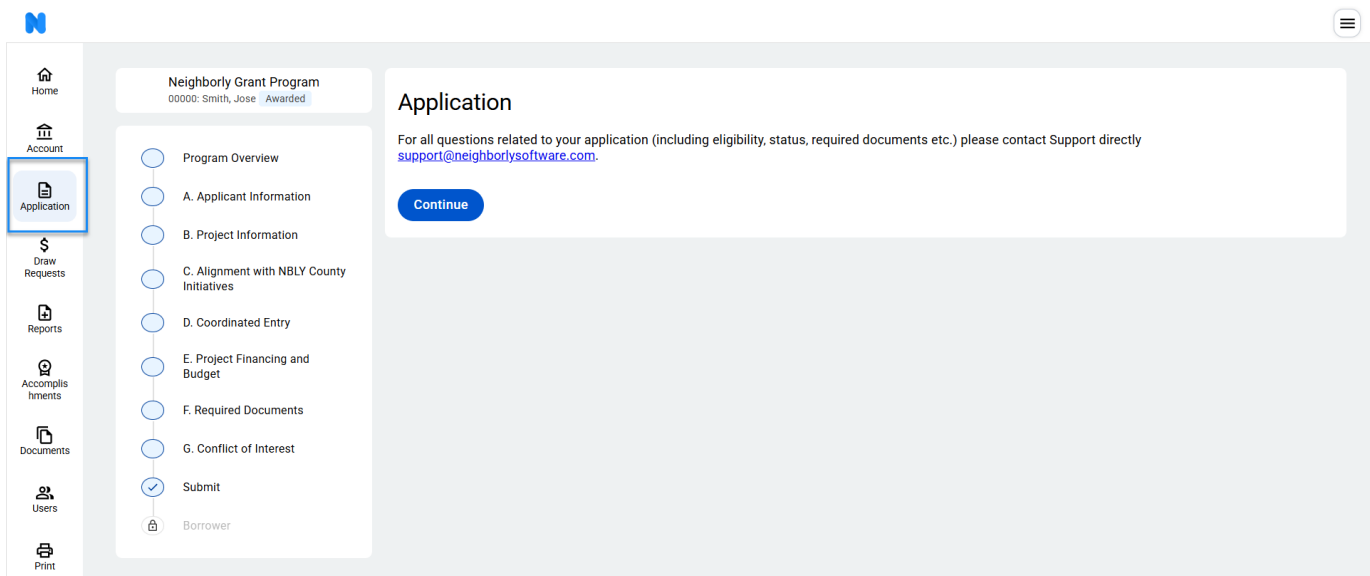
Budget Categories

Construction Costs
ID 0000 FUNDING NBRLY 2026-2027

AMOUNT	DISBURSED	REMAINING
\$1,000	\$0	\$1,000

Application

The Application section shows you information submitted to participate in this program.



The screenshot shows the 'Application' page for the 'Neighborly Grant Program'. The left sidebar contains navigation icons for Home, Account, Application (highlighted), Draw Requests, Reports, Accomplishments, Documents, Users, and Print. The main content area displays the following information:

Neighborly Grant Program
00000: Smith, Jose | Awarded

Application

For all questions related to your application (including eligibility, status, required documents etc.) please contact Support directly support@neighborlysoftware.com.

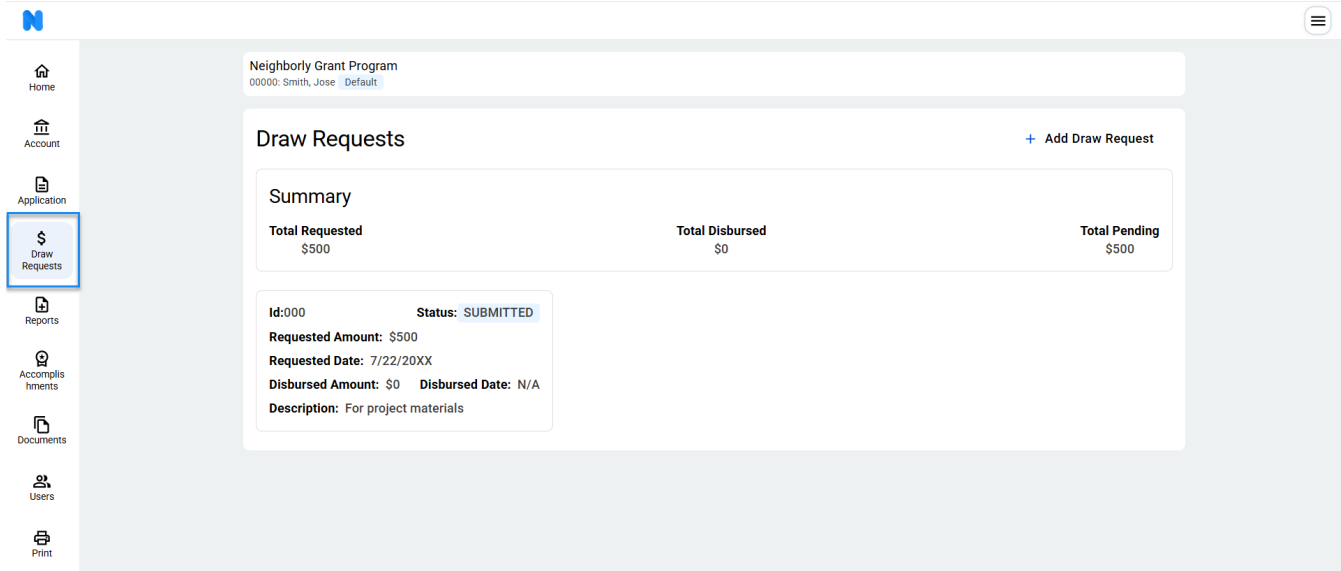
[Continue](#)

Application Steps:

- Program Overview
- A. Applicant Information
- B. Project Information
- C. Alignment with NBLY County Initiatives
- D. Coordinated Entry
- E. Project Financing and Budget
- F. Required Documents
- G. Conflict of Interest
- Submit** (checked)
- Borrower

Draw Requests

Draw Requests allow you to request draws from your remaining account balance. The initial screen is a summary of any existing draw requests and disbursement data. To view additional information on an existing draw, select anywhere on that draw card.



The screenshot shows the Neighborly Software interface for the "Neighborly Grant Program". The left sidebar contains navigation icons for Home, Account, Application, Draw Requests (highlighted with a blue box), Reports, Accomplishments, Documents, Users, and Print. The main content area displays the "Draw Requests" page. At the top right of the main area is a menu icon. Below the header, there is a "Draw Requests" section with a "+ Add Draw Request" link. A "Summary" table shows the following data:

Total Requested	Total Disbursed	Total Pending
\$500	\$0	\$500

Below the summary, a card displays details for a specific draw request:

- Id:** 000
- Status:** SUBMITTED
- Requested Amount:** \$500
- Requested Date:** 7/22/20XX
- Disbursed Amount:** \$0
- Disbursed Date:** N/A
- Description:** For project materials

Submitting a New Draw

Add Draw Request

Fields marked with * are required

Request Date *

mm/dd/yyyy

Description *

Please provide a request date and description to create a draw request.

Add

Cancel

To create a new draw, select the "+ Add a Draw."

A pop-up window appears, asking for a request date and description. After you enter this information, select "Add" to continue the draw submission process.

After selecting "Add" on the pop-up screen, additional details appear, including status, draw request date, Approver, summary, and a place to upload documents as needed.

Note: The draw request is not submitted until the Submit button is clicked. Continue to the bottom of this screen to enter in draw amounts and complete submission.

Draw 000

Download

Fields marked with * are required

***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.

Details

Status: NOT SUBMITTED

Requested: 7/29/20XX

Approver:

Amount Requested: \$0

Amount Approved: \$0

Summary

Description *

Materials for roofing

Documentation

No Files Uploaded

Upload File

or drag and drop files here

At the bottom of the draw request screen, enter the amount being requested and select submit. Once submitted, the draw request will be forwarded to a Program Administrator for review and approval. The draw will then be in a read-only mode where no further edits/changes can be made.

Amounts

Construction Costs

Original amount: \$1,000

Other disbursements: \$0

Balance: \$1,000

Amount requested *

\$

0.00

Cancel

Submit

Reports

The Reports section shows if a report is Due or Past Due, In Progress, or Complete. Select a report to see additional information. To start a new report, select "Start" to begin entering information for that reporting period.

Note: You can't start or complete a report until its reporting period opens.



- Home
- Account
- Application
- Draw Requests
- Reports**
- Accomplishments
- Documents
- Users
- Print

Neighborly Grant Program
00000: Smith, Jose Default

REPORT ID: 0000

Period: 01/01/20XX - 03/31/20XX

Available: 03/31/20XX

Due: 04/15/20XX

Progress: 4 of 4 steps completed

Files: 0

Submitted By: support@neighborlysoftware.com

COMPLETE

View Print

REPORT ID: 0001

Period: 04/01/20XX - 06/30/20XX

Available: 06/30/20XX

Due: 07/15/20XX

Progress: 0 of 4 steps completed

Files: 0

Submitted By: N/A

IN PROGRESS

View Print

REPORT ID: 0002

Period: 07/01/20XX - 09/30/20XX

Available: 09/30/20XX

Due: 10/15/20XX

Progress: 3 of 4 steps completed

Files: 0

Submitted By: N/A

IN PROGRESS

View Print

REPORT ID: 0003

Period: 10/01/20XX - 12/31/20XX

Available: 10/31/20XX

Due: 01/15/20XX

Progress: 0 of 4 steps completed

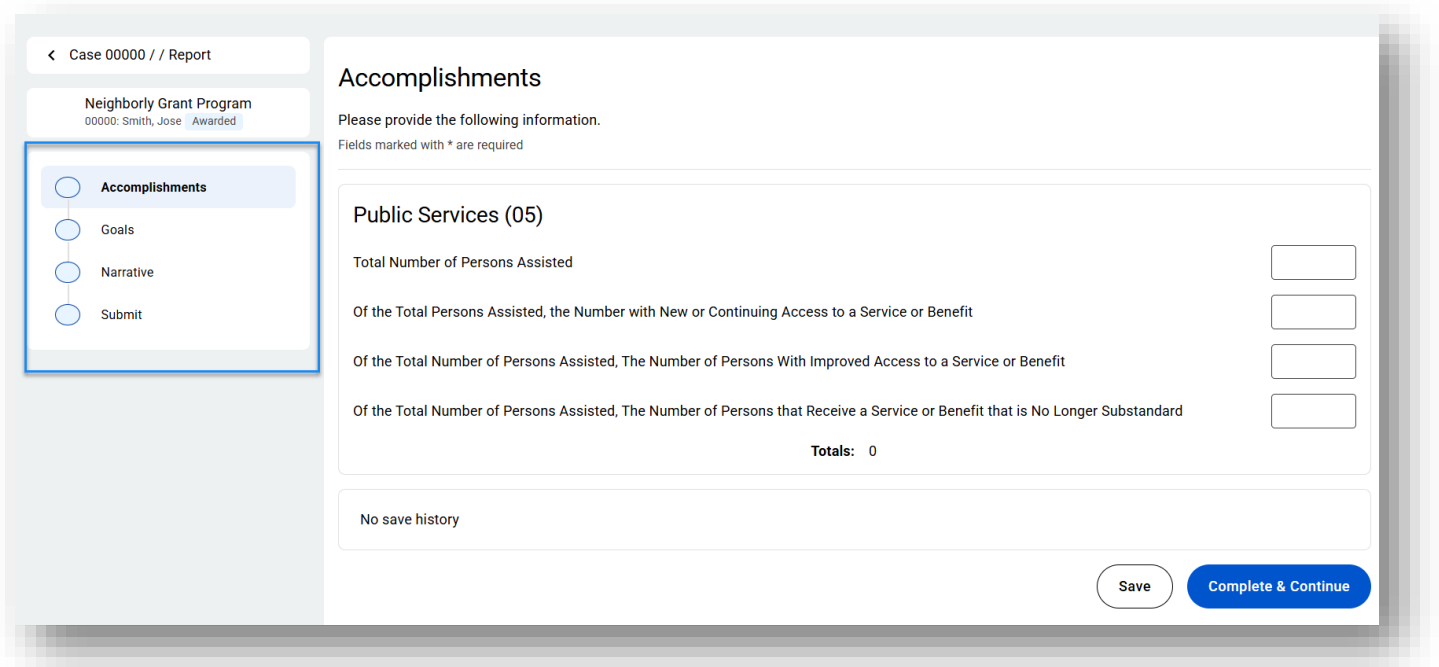
Files: 0

Submitted By: N/A

PAST DUE

Start

Once inside a report, you'll see multiple items to complete, depending on your grant program. Usually there are at least 3 items- one for reporting Accomplishment data, one for Goal progress, and one to certify and Submit the report. Sometimes, you may see a Narrative item as well. Complete each item by entering in the corresponding information and selecting "Complete and Continue." You may also Save your work to return to the report later.



< Case 00000 / / Report

Neighborly Grant Program
00000: Smith, Jose Awarded

Accomplishments

Goals

Narrative

Submit

Accomplishments

Please provide the following information.
Fields marked with * are required

Public Services (05)

Total Number of Persons Assisted	
Of the Total Persons Assisted, the Number with New or Continuing Access to a Service or Benefit	
Of the Total Number of Persons Assisted, The Number of Persons With Improved Access to a Service or Benefit	
Of the Total Number of Persons Assisted, The Number of Persons that Receive a Service or Benefit that is No Longer Substandard	

Totals: 0

No save history

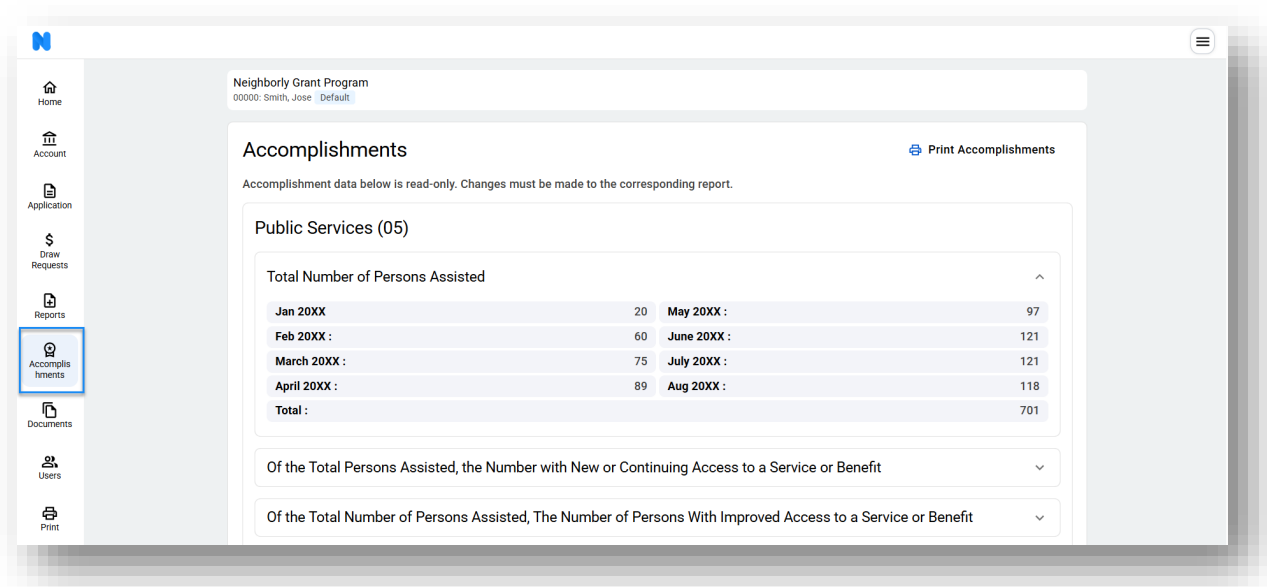
Save Complete & Continue

Select "Reopen" at the bottom of the page to reopen a step. The report is not Complete and Submitted until every item is individually marked Complete. Once the report is fully completed and submitted, it will no longer be available for any further edits or changes unless reopened by a Program Administrator.

Accomplishments

The Accomplishments screen provides a summary of Accomplishment data entered in the Reports section. Select each Accomplishment to expand for additional details.

Note: This screen is read-only. You can only add or change accomplishment data in the Reports section.



Neighborly Grant Program
00000: Smith, Jose - Default

Accomplishments

[Print Accomplishments](#)

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

Public Services (05)

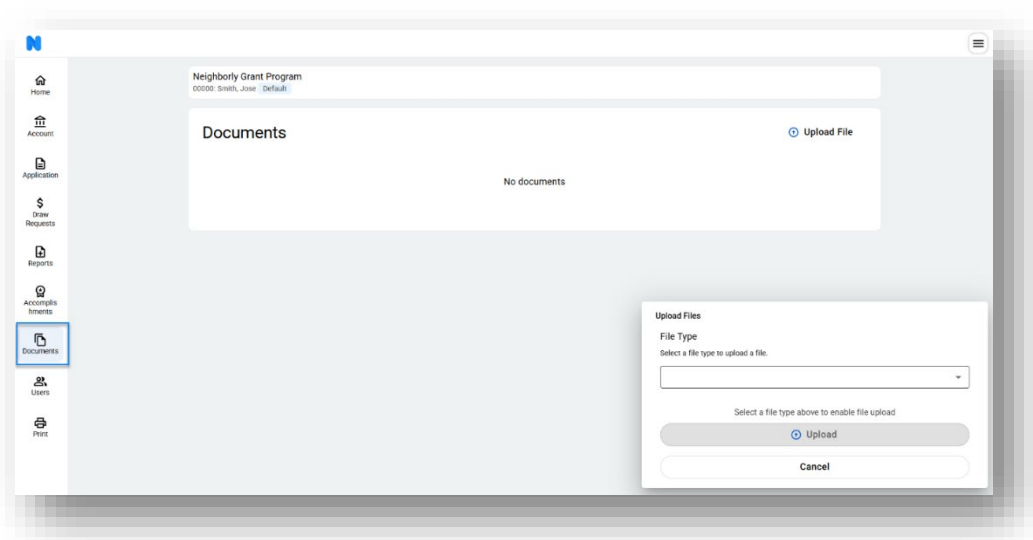
Total Number of Persons Assisted			
Jan 20XX	20	May 20XX :	97
Feb 20XX :	60	June 20XX :	121
March 20XX :	75	July 20XX :	121
April 20XX :	89	Aug 20XX :	118
Total :			701

Of the Total Persons Assisted, the Number with New or Continuing Access to a Service or Benefit

Of the Total Number of Persons Assisted, The Number of Persons With Improved Access to a Service or Benefit

Documents

A Program Administrator may ask that you upload documents to your case. Select the Documents section, click "Upload File" and select the appropriate file type. Any previously uploaded documents will be visible here as well.



Neighborly Grant Program
00000: Smith, Jose - Default

Documents

[Upload File](#)

No documents

Upload Files

File Type
Select a file type to upload a file.

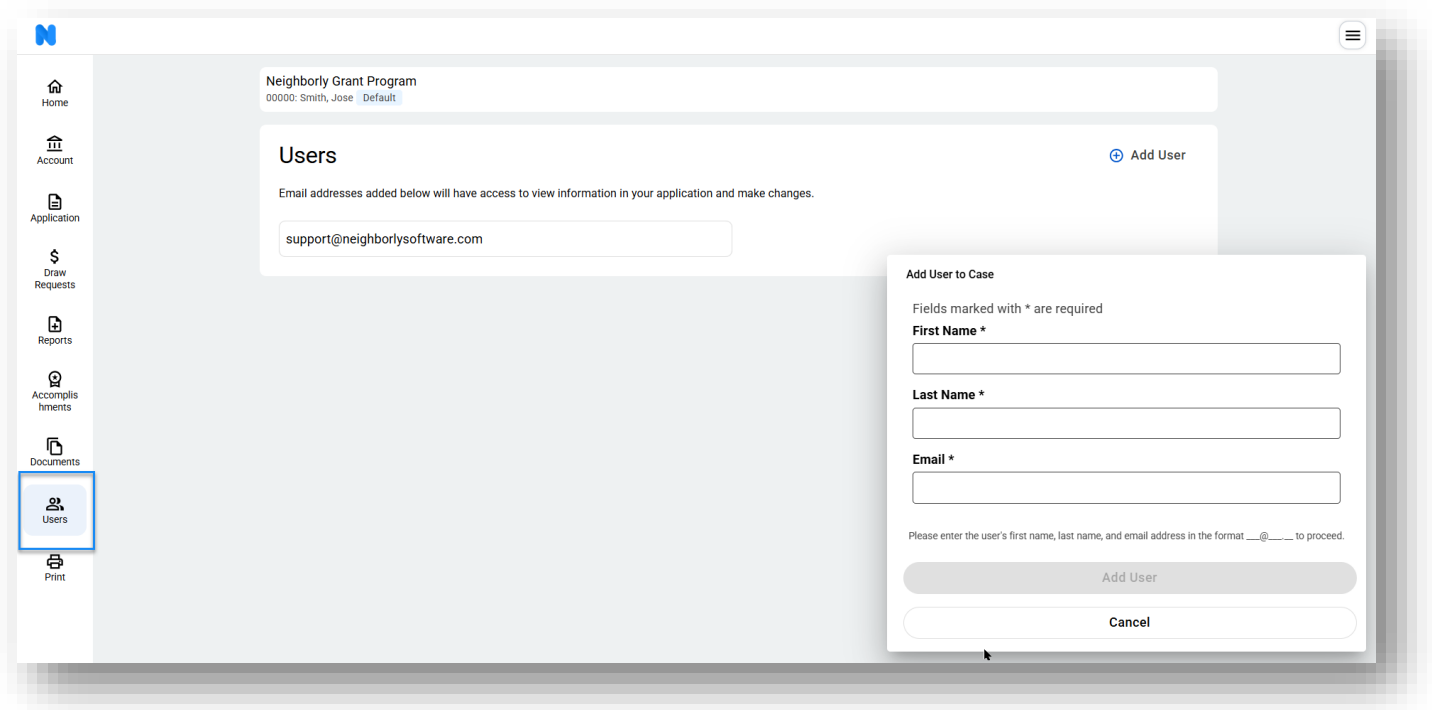
Select a file type above to enable file upload

[Upload](#)

[Cancel](#)

Users

Additional Users can be added to your case to support management of the case. If necessary, add in their first name, last name, and email address.



Neighborly Grant Program
00000: Smith, Jose Default

Users

Email addresses added below will have access to view information in your application and make changes.

support@neighborlysoftware.com

[Add User](#)

Add User to Case

Fields marked with * are required

First Name *

Last Name *

Email *

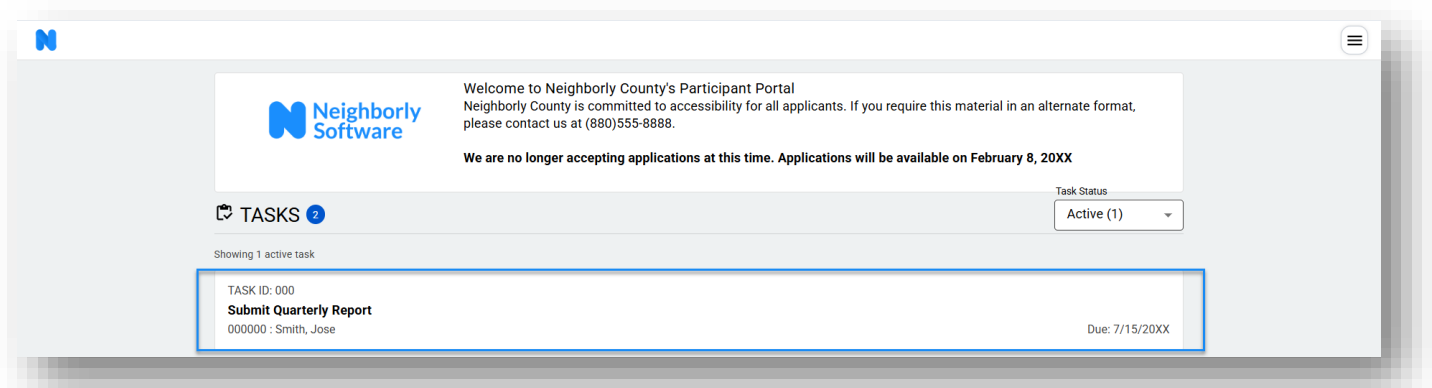
Please enter the user's first name, last name, and email address in the format ____@____ to proceed.

[Add User](#)

[Cancel](#)

Tasks

A Program Administrator may assign you a task. Tasks appear on your Portal Dashboard. To open a task, select anywhere on its row. This opens your case.



Welcome to Neighborly County's Participant Portal
Neighborly County is committed to accessibility for all applicants. If you require this material in an alternate format, please contact us at (880)555-8888.

We are no longer accepting applications at this time. Applications will be available on February 8, 20XX

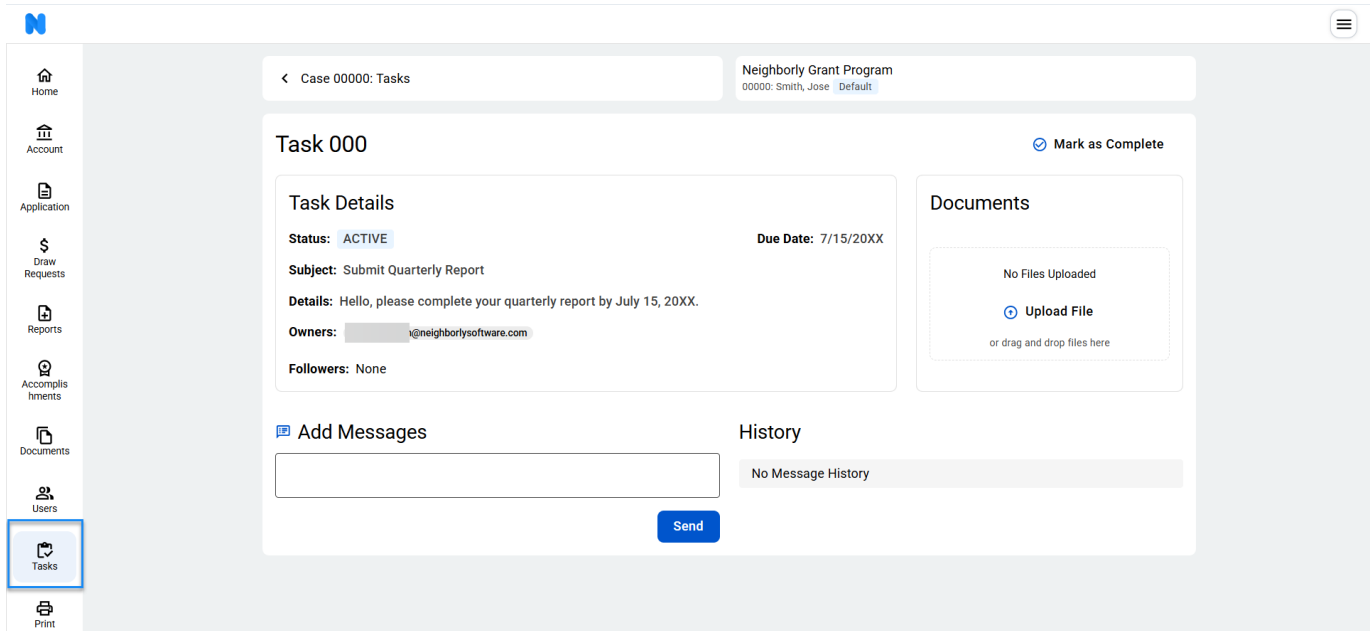
TASKS 2

Task Status: Active (1)

Showing 1 active task

TASK ID: 000 Submit Quarterly Report 000000 : Smith, Jose	Due: 7/15/20XX
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You'll now see an additional section in your case, between "Users" and "Print," called "Tasks." In the Task, review the message from the Program Administrator, upload files, respond directly to the task, and mark it complete once all requirements are met.



The screenshot displays the 'Task 000' page in the Neighborly Software interface. The sidebar on the left contains navigation icons for Home, Account, Application, Draw Requests, Reports, Accomplishments, Documents, Users, Tasks (highlighted with a blue box), and Print. The top navigation bar shows 'Case 00000: Tasks' and 'Neighborly Grant Program' with subtext '00000: Smith, Jose' and 'Default'. The main content area is titled 'Task 000' and includes a 'Mark as Complete' button. The 'Task Details' section shows 'Status: ACTIVE', 'Due Date: 7/15/20XX', 'Subject: Submit Quarterly Report', 'Details: Hello, please complete your quarterly report by July 15, 20XX.', 'Owners: [redacted]@neighborlysoftware.com', and 'Followers: None'. The 'Documents' section shows 'No Files Uploaded' and an 'Upload File' button. The 'Add Messages' section has a text input field and a 'Send' button. The 'History' section shows 'No Message History'.

Technical Difficulties

If you have technical problems, contact your Program Administrator for help.