

Participant User Guide

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BENEVATE, INC.
DBA NEIGHBORLY SOFTWARE



Neighborly Software

www.NeighborlySoftware.com



Table of Contents

Accessing Participant Portal.....	3
Registration	3
Signing In	4
Password Reset.....	4
Starting a New Application.....	5
Components of an Application	6
Tasks	7
Draws.....	8
Technical Difficulties.....	9

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.

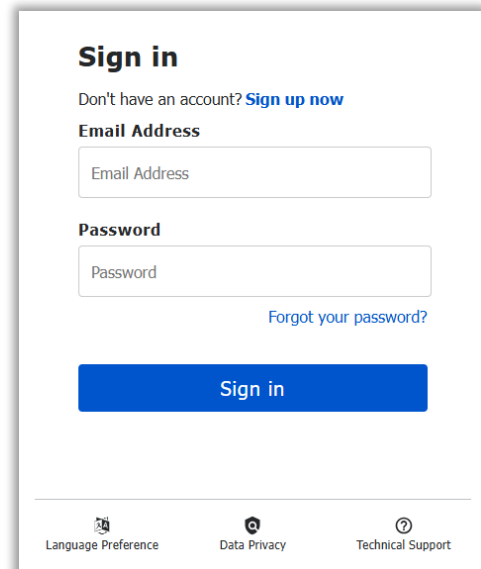
Participant Portal Link: https://portal.neighborlysoftware.com/*tenantname/Participant

*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](#)

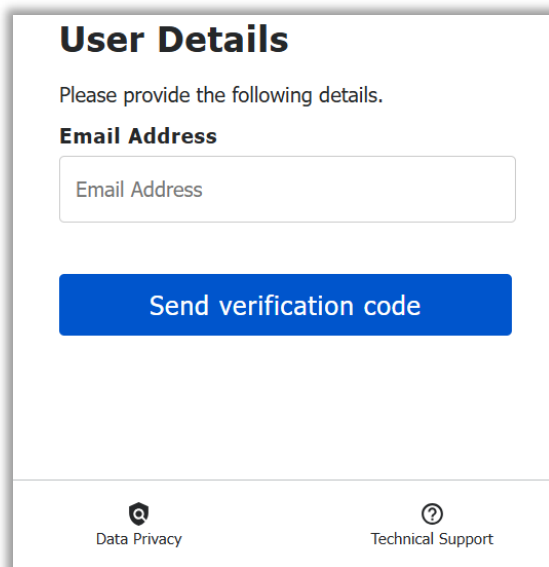
Email Address

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."

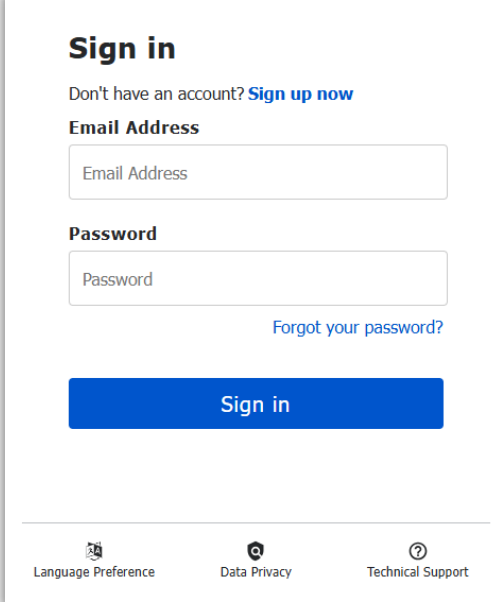
If the code doesn't work, select "Send new code." We'll email you a new one.

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.

A screenshot of a web form titled "Sign in". At the top, it says "Don't have an account? [Sign up now](#)". Below this are two input fields: "Email Address" and "Password". To the right of the password field is a link that says "Forgot your password?". At the bottom of the form is a blue button labeled "Sign in". Below the form, there are three links: "Language Preference", "Data Privacy", and "Technical Support", each with a small icon above it.

Sign in

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

Email Address

Email Address

Password

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."

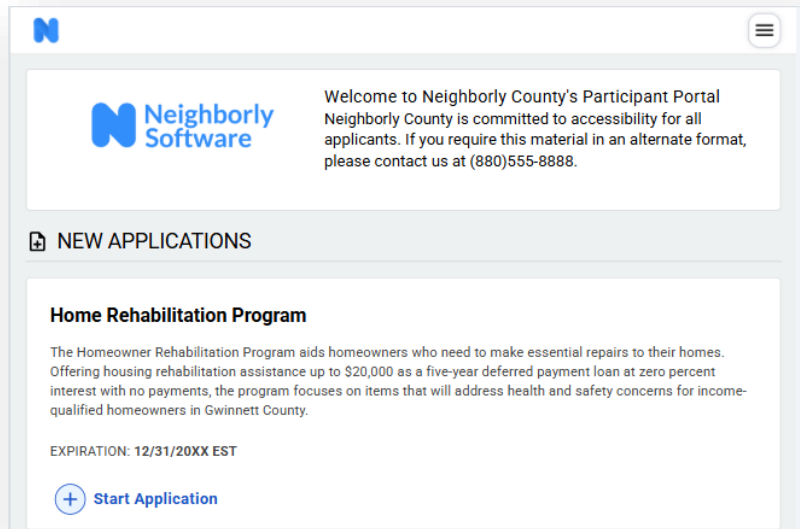
If you don't get a code after 2 minutes, repeat these steps to get a new one.

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.

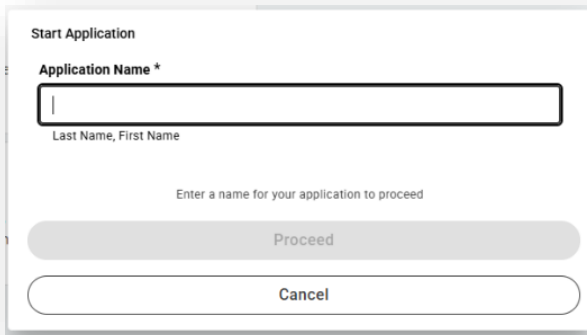
Starting a New Application

After you log in, you'll see your dashboard. It lists any programs you can apply to, along with any applications you've already started. Select "Start Application," or select an application you already started.

View of starting a new application



The screenshot shows the Neighborly Software Participant Portal. At the top, there is a welcome message: "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." Below this, the "NEW APPLICATIONS" section is highlighted. It features the "Home Rehabilitation Program" with a description: "The Homeowner Rehabilitation Program aids homeowners who need to make essential repairs to their homes. Offering housing rehabilitation assistance up to \$20,000 as a five-year deferred payment loan at zero percent interest with no payments, the program focuses on items that will address health and safety concerns for income-qualified homeowners in Gwinnett County." The expiration date is listed as "EXPIRATION: 12/31/20XX EST". At the bottom of this section is a blue button with a plus icon and the text "Start Application".

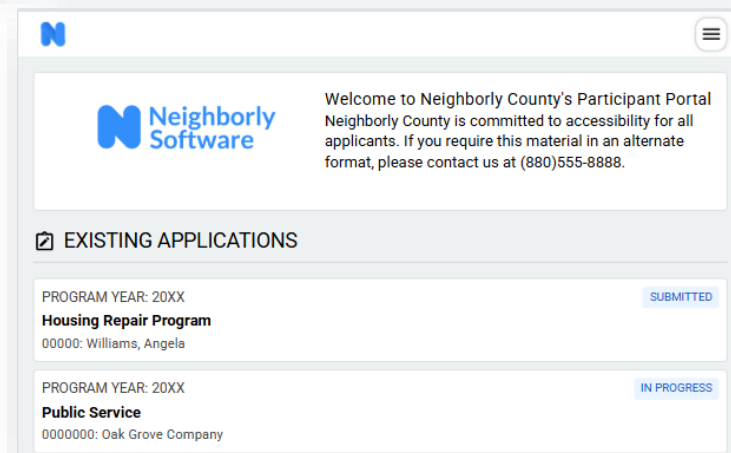


The screenshot shows a "Start Application" modal form. It has a title "Start Application" and a label "Application Name *". Below the label is a text input field. Underneath the input field, it says "Last Name, First Name". Below the input field, there is a prompt: "Enter a name for your application to proceed". At the bottom of the form are two buttons: "Proceed" and "Cancel".

A new window will appear on your screen to begin.

View of reopening a previously created application

The information next to your application shows your case status.

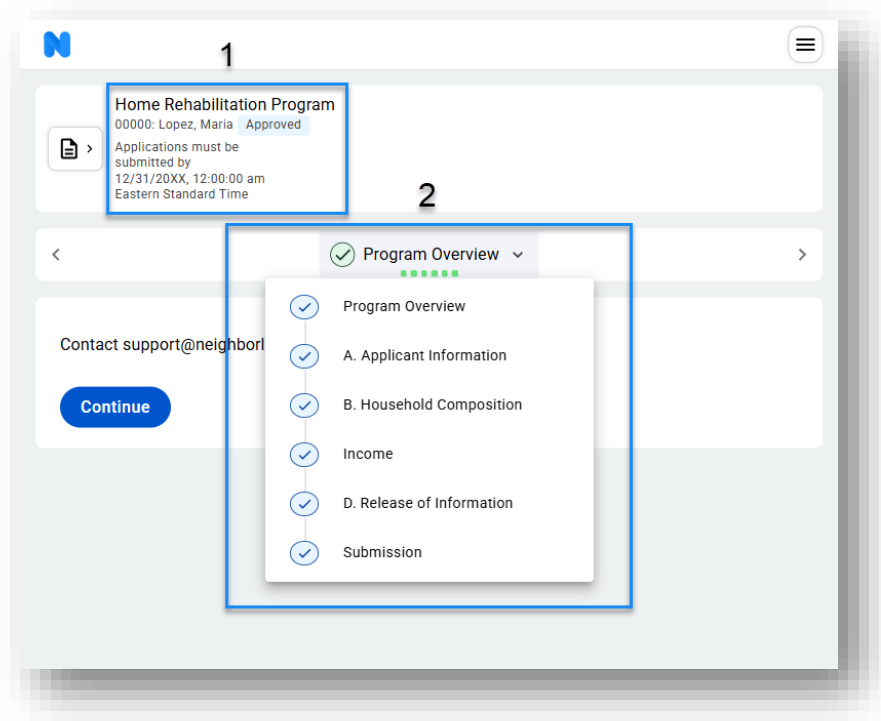


The screenshot shows the Neighborly Software Participant Portal. At the top, there is a welcome message: "Welcome to Neighborly County's Participant Portal. Neighborly County is committed to accessibility for all applicants. If you require this material in an alternate format, please contact us at (880)555-8888." Below this, the "EXISTING APPLICATIONS" section is highlighted. It lists two applications. The first application is for the "Housing Repair Program" with the program year "20XX" and the applicant "00000: Williams, Angela". It has a blue button labeled "SUBMITTED". The second application is for the "Public Service" with the program year "20XX" and the applicant "0000000: Oak Grove Company". It has a blue button labeled "IN PROGRESS".

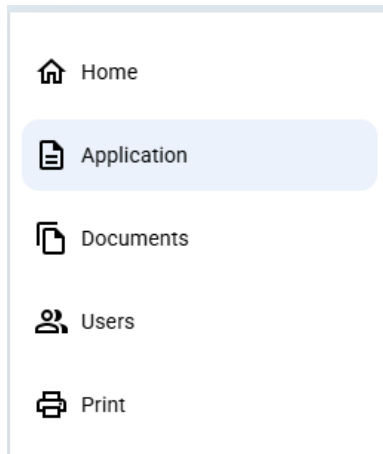
Components of an Application

Enter the information needed for your application. Your case may look different depending on the program you're applying to.

1. **Case Overview** - Find your case id, status, and submission details.
2. **Steps of an Application** - All the steps you need to finish your application. These steps depend on your program. A blue checkmark appears next to each step you complete. Select the step you are on at anytime to open the dropdown.



Sections of your case



Your case may include these sections, depending on your program. Select the paper icon to the left of your case information to find:

Home - Go back to the Participant Portal homepage.

Application - The information you give us to apply.

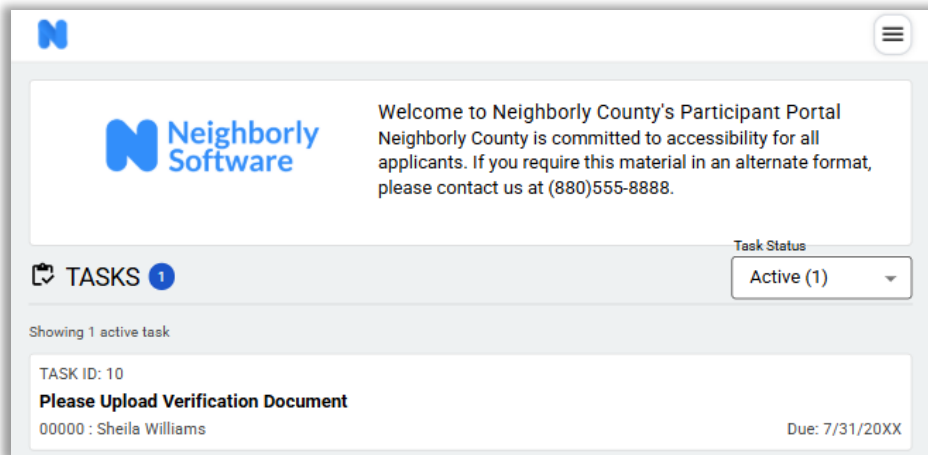
Documents - If turned on, upload and review documents for your case.

Users - If turned on, add other people to your case to help you complete and track your application.

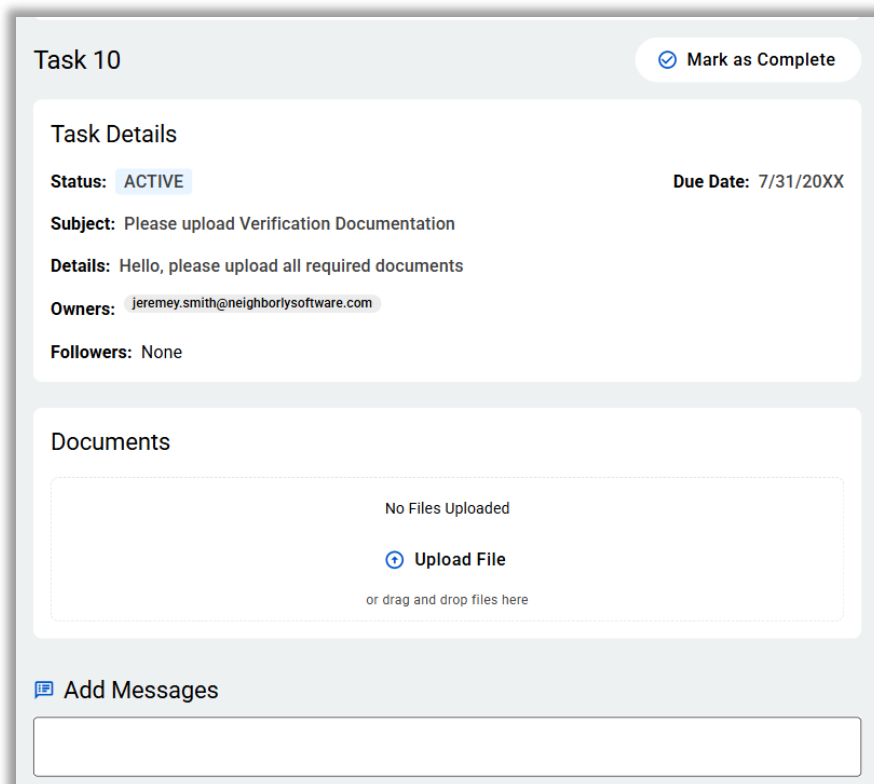
Print - If turned on, print your entire application.

Tasks

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

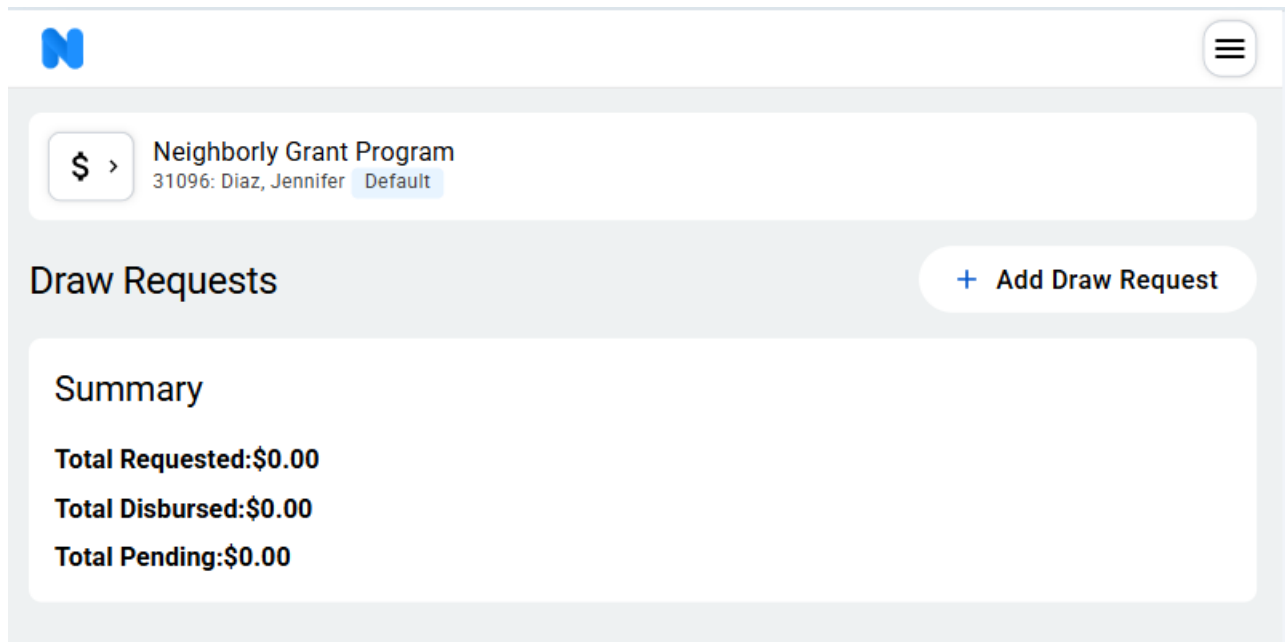


Read the task details and complete what's asked. You can upload files and reply to the Administrator.

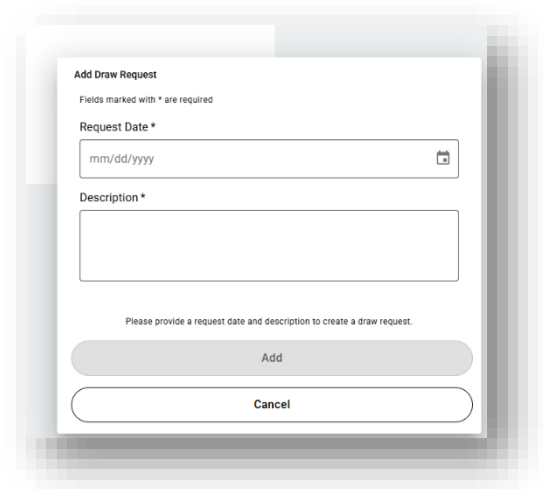


Draws

If your program includes a Draws section, you'll see it with the other sections of your case. Select the Account Icon to open draws. Draws are requests to release funds for completed work. You can submit a draw request directly from the Participant Portal.

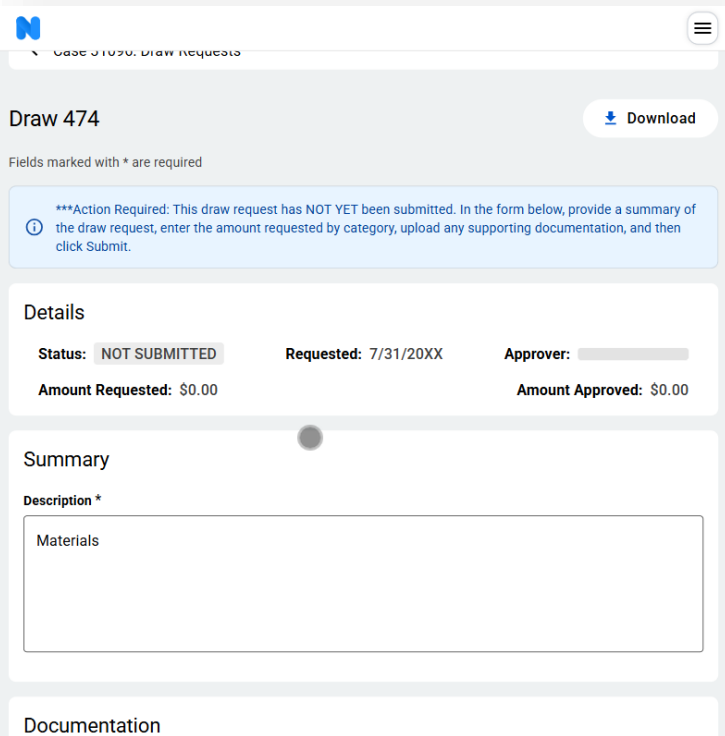


The screenshot shows the Neighborly Grant Program interface. At the top, there is a blue 'N' logo and a hamburger menu icon. Below the logo, a box displays the program name 'Neighborly Grant Program' and the account identifier '31096: Diaz, Jennifer' with a 'Default' tag. The main section is titled 'Draw Requests' and includes a '+ Add Draw Request' button. Below this, a 'Summary' box shows the following values: 'Total Requested:\$0.00', 'Total Disbursed:\$0.00', and 'Total Pending:\$0.00'.



The 'Add Draw Request' modal form is shown. It includes a title 'Add Draw Request' and a note 'Fields marked with * are required'. The form has two main fields: 'Request Date *' with a date picker icon and a placeholder 'mm/dd/yyyy', and 'Description *' with a text area. Below these fields, a message states 'Please provide a request date and description to create a draw request.' At the bottom, there are two buttons: 'Add' and 'Cancel'.

Select "+ Add Draw Request." A window opens in the bottom right. Enter the date and a description of your request.



Draw 474 [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: 7/31/20XX Approver:

Amount Requested: \$0.00 Amount Approved: \$0.00

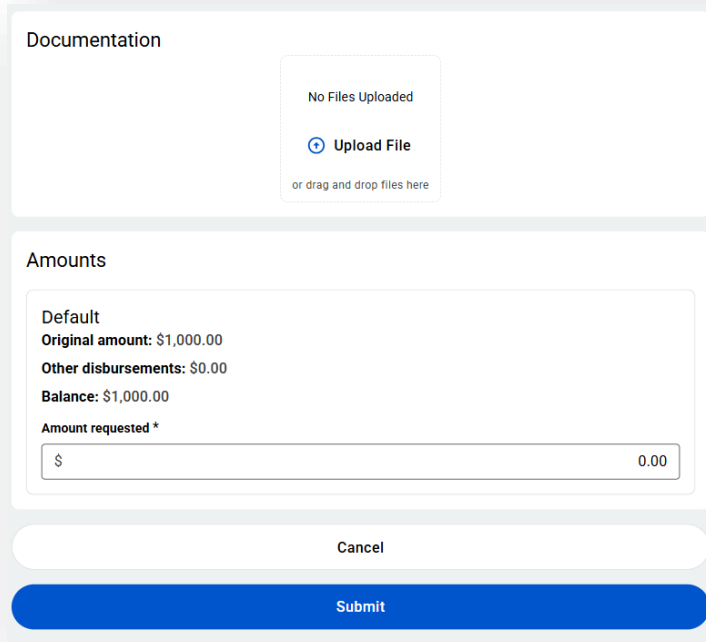
Summary

Description *

Materials

Documentation

After you enter these details, the Draw section opens. Add more information, like the amount and, if needed, supporting documents.



Documentation

No Files Uploaded

[Upload File](#)

or drag and drop files here

Amounts

Default

Original amount: \$1,000.00

Other disbursements: \$0.00

Balance: \$1,000.00

Amount requested *

\$ 0.00

[Cancel](#)

[Submit](#)

Be sure click **Submit** to that the program administrator receives your request.

Technical Difficulties

If you have technical problems, contact your program administrator for help.