

Participant User Guide

LAST UPDATED: AUGUST 2026

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.

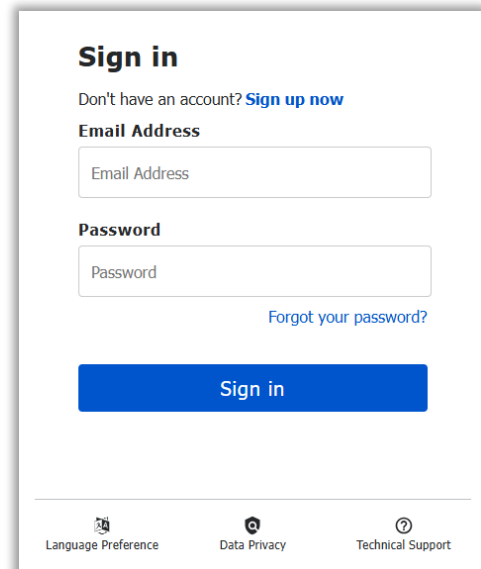
Participant Portal Link: <https://portal.neighborlysoftware.com/tenantname/Participant>

*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](#)

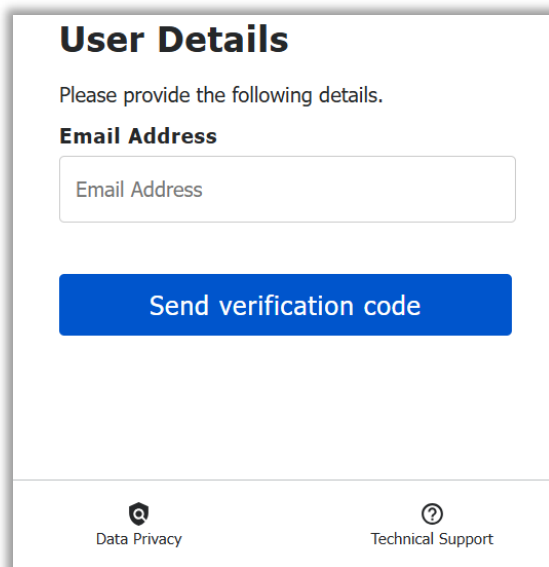
Email Address

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."

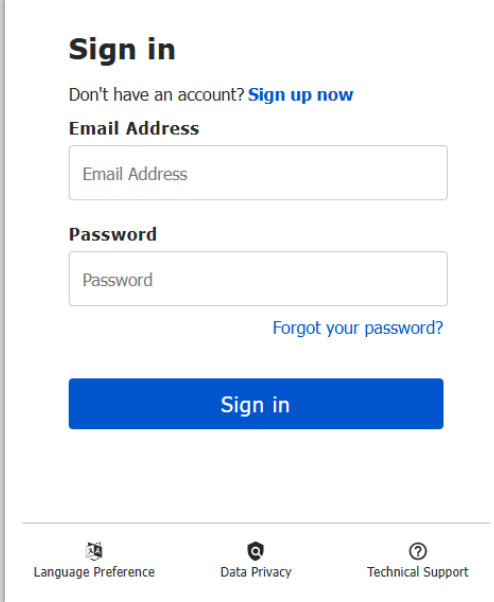
If the code doesn't work, select "Send new code." We'll email you a new one.

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 is a section for "Email Address" with a text input field. Underneath is a section for "Password" with a text input field. To the right of the password field is a link that says "Forgot your password?". At the bottom of the form is a large 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.

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."

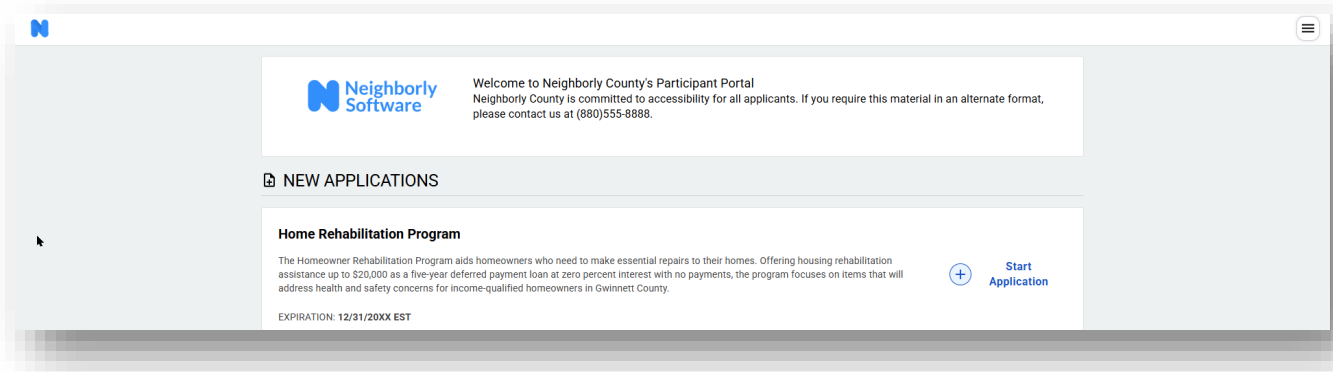
If you don't get a code after 2 minutes, repeat these steps to get a new one.

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.

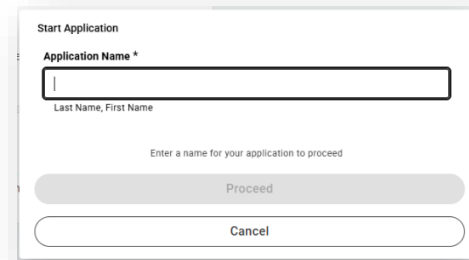
Starting a New Application

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



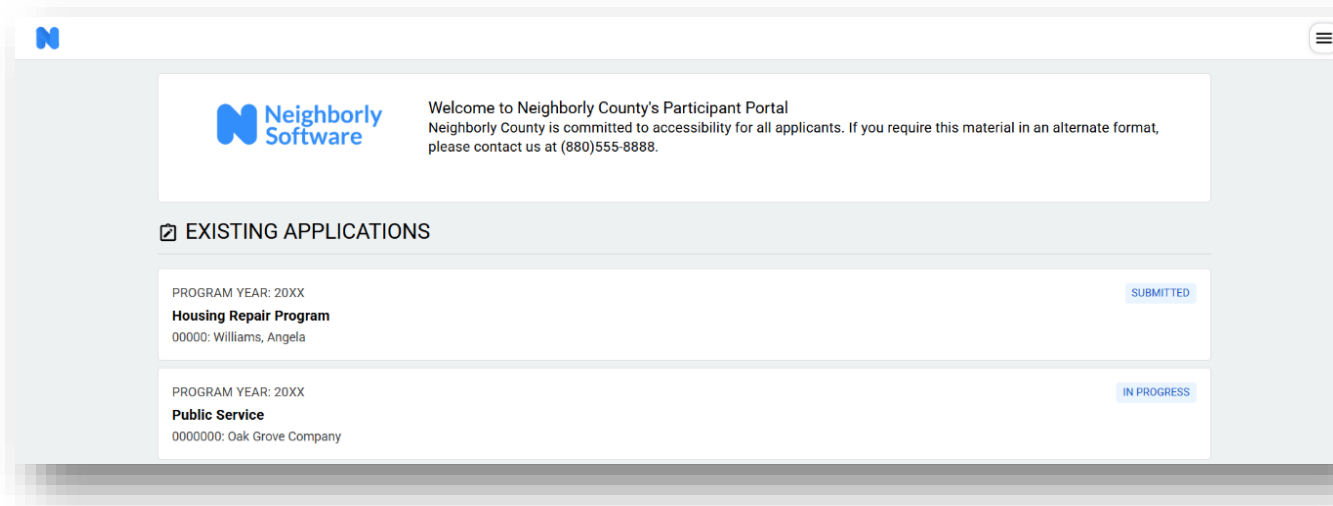
A new window will appear in the bottom left of your screen to begin.



The "Start Application" modal window is displayed. It has a title "Start Application". Below the title, there's a label "Application Name *" followed by a text input field. Below the input field, it says "Last Name, First Name". A hint text below the input field reads "Enter a name for your application to proceed". At the bottom of the modal, there are two buttons: "Proceed" (disabled) and "Cancel" (active).

View of reopening a previously created application

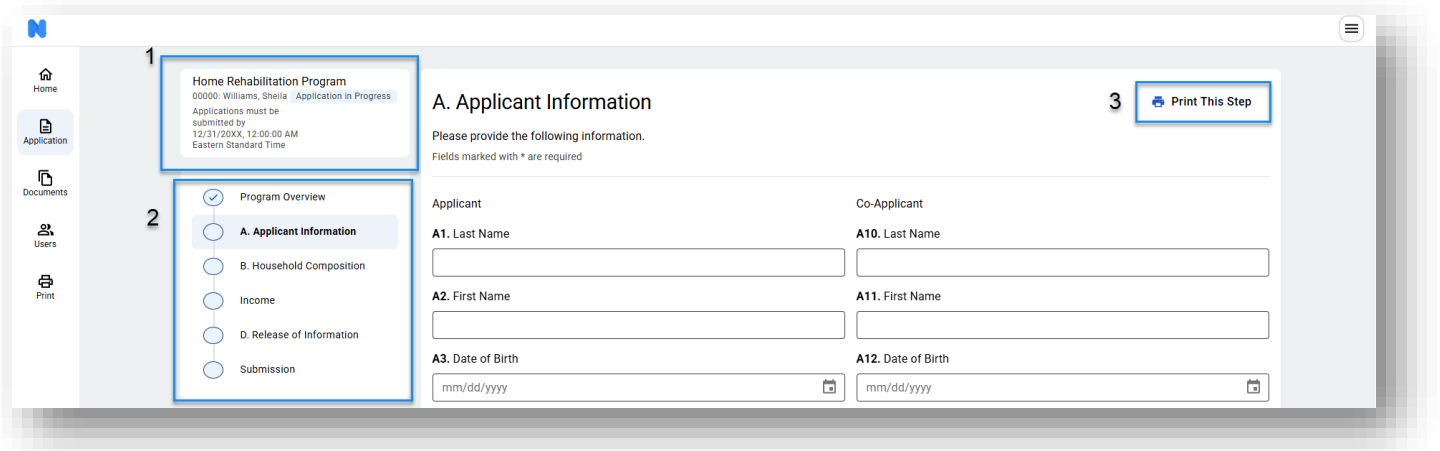
The information next to your application shows your case status.



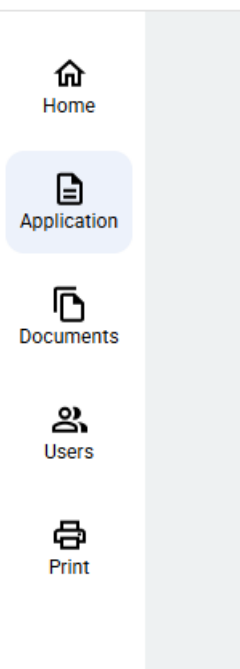
Components of an Application

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.
3. **Print** - Print this individual step.



The screenshot shows the Neighborly Software interface. On the left is a sidebar with icons for Home, Application, Documents, Users, and Print. The main content area is divided into three numbered sections: 1. Case Overview, 2. Steps of an Application, and 3. Print This Step. The 'Steps of an Application' section shows a progress bar with steps: Program Overview, A. Applicant Information (selected), B. Household Composition, Income, D. Release of Information, and Submission. The 'A. Applicant Information' form is displayed, with fields for Applicant and Co-Applicant information, including Last Name, First Name, and Date of Birth. A 'Print This Step' button is visible in the top right corner.



Sections of your case

Your case may include these sections, depending on your program:

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.

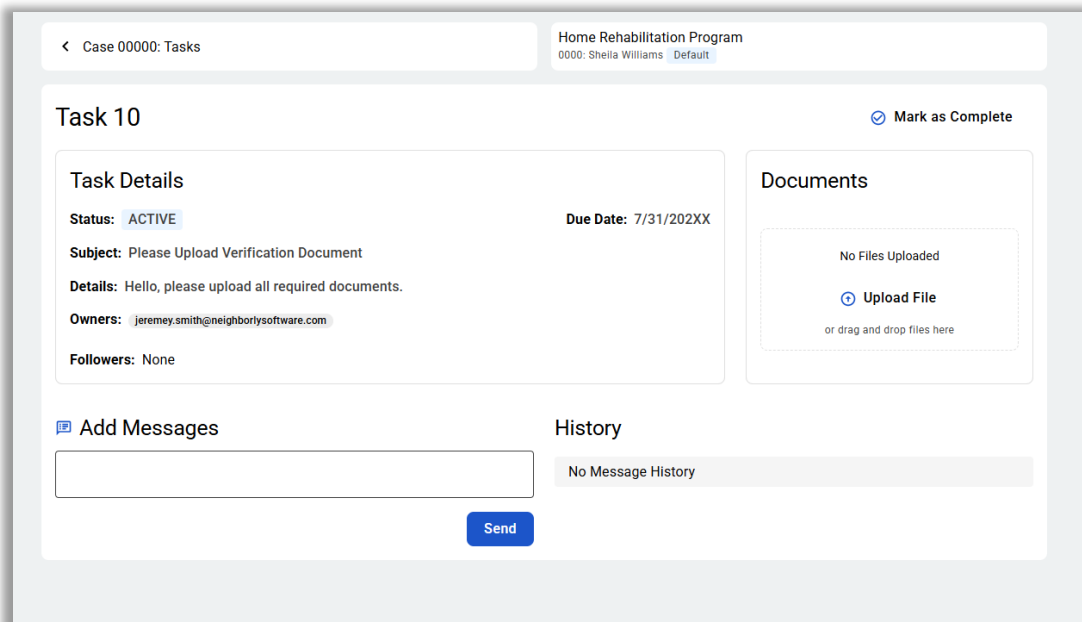
Tasks

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



The screenshot shows the top section of the Neighborly Software Participant Portal. At the top left is the Neighborly Software logo. To its right 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 the logo is a "TASKS" section with a notification badge showing "1". To the right of the tasks section is a "Task Status" dropdown menu currently set to "Active (1)". Below the tasks section, it says "Showing 1 active task". A task card is displayed with the following information: "TASK ID: 10", "Please Upload Verification Document", "00000 : Sheila Williams", and "Due: 7/31/20XX".

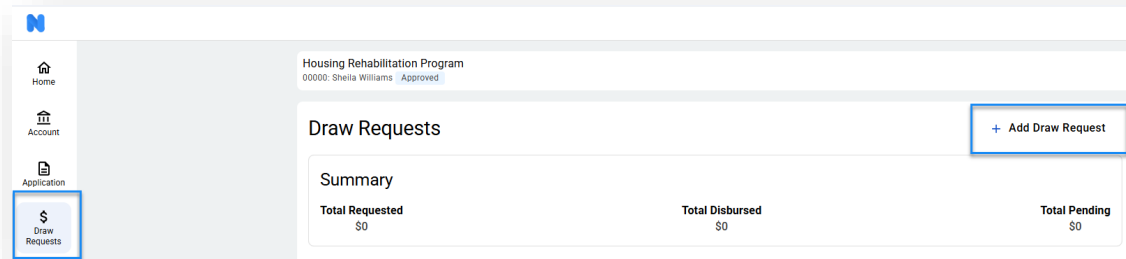
Read the task details and complete what's asked. You can upload files and reply to the Administrator.



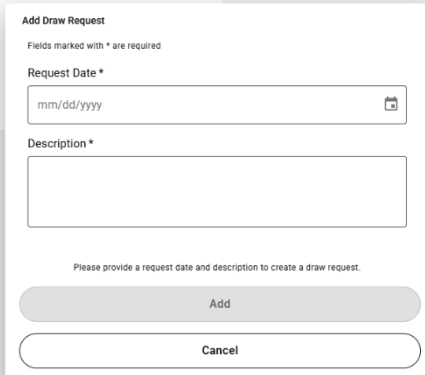
The screenshot shows the "Task 10" details page. At the top, there is a breadcrumb trail: "< Case 00000: Tasks". To the right, it says "Home Rehabilitation Program" and "0000: Sheila Williams Default". The main heading is "Task 10". To the right of the heading is a "Mark as Complete" button with a checkmark icon. Below the heading, there are two main sections: "Task Details" and "Documents". The "Task Details" section contains the following information: "Status: ACTIVE", "Subject: Please Upload Verification Document", "Details: Hello, please upload all required documents.", "Owners: jeremey.smith@neighborlysoftware.com", and "Followers: None". The "Documents" section contains the text "No Files Uploaded" and an "Upload File" button with a plus icon. Below the "Documents" section, it says "or drag and drop files here". At the bottom left, there is an "Add Messages" section with a text input field and a "Send" button. To the right of the "Add Messages" section is a "History" section that says "No Message History".

Draws

If your program includes a Draws section, you'll see it on the left side of your case. Draws are requests to release funds for completed work. You can submit a draw request directly from the Participant Portal.



The screenshot shows the 'Housing Rehabilitation Program' interface. On the left is a sidebar with icons for Home, Account, Application, and Draw Requests (highlighted with a blue box). The main area is titled 'Draw Requests' and includes a '+ Add Draw Request' button. Below this is a 'Summary' table with three columns: 'Total Requested' (\$0), 'Total Disbursed' (\$0), and 'Total Pending' (\$0).

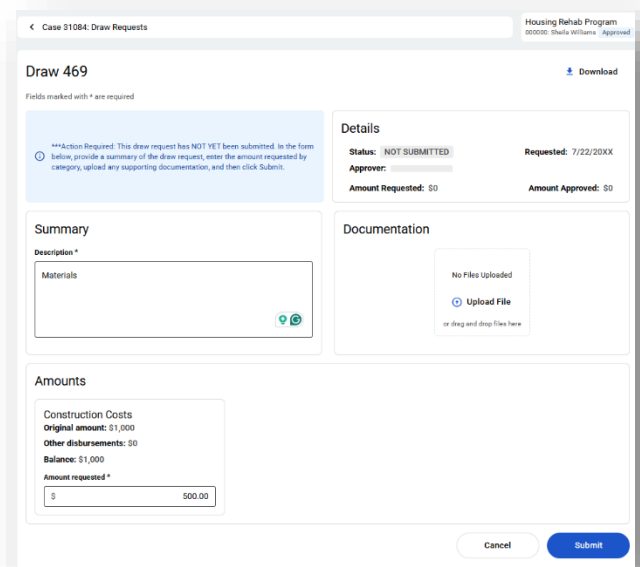


The 'Add Draw Request' modal form contains the following fields and controls:

- Request Date ***: A date input field with a calendar icon and placeholder text 'mm/dd/yyyy'.
- Description ***: A text input field.
- Buttons**: 'Add' and 'Cancel' buttons at the bottom.
- Instructions**: A note stating 'Please provide a request date and description to create a draw request.'

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

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



The 'Draw 469' details form is divided into several sections:

- Details**: Includes 'Status: NOT SUBMITTED', 'Requested: 7/22/20XX', 'Amount Requested: \$0', and 'Amount Approved: \$0'.
- Summary**: Contains a 'Description' field with the text 'Materials' and a file upload icon.
- Documentation**: Shows 'No Files Uploaded' and an 'Upload File' button with a note 'or drag and drop files here'.
- Amounts**: A section for financial details including 'Construction Costs', 'Original amount: \$1,000', 'Other disbursements: \$0', 'Balance: \$1,000', and an 'Amount requested' field set to '\$ 500.00'.
- Buttons**: 'Cancel' and 'Submit' buttons at the bottom right.

Technical Difficulties

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