

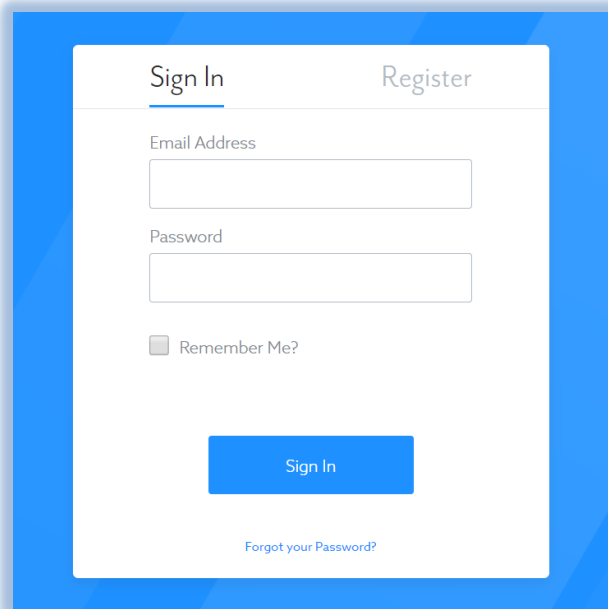
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Accessing the Subrecipient Portal

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/WACOTX/Participant>



Sign InRegister

Email Address

Password

☐ Remember Me?

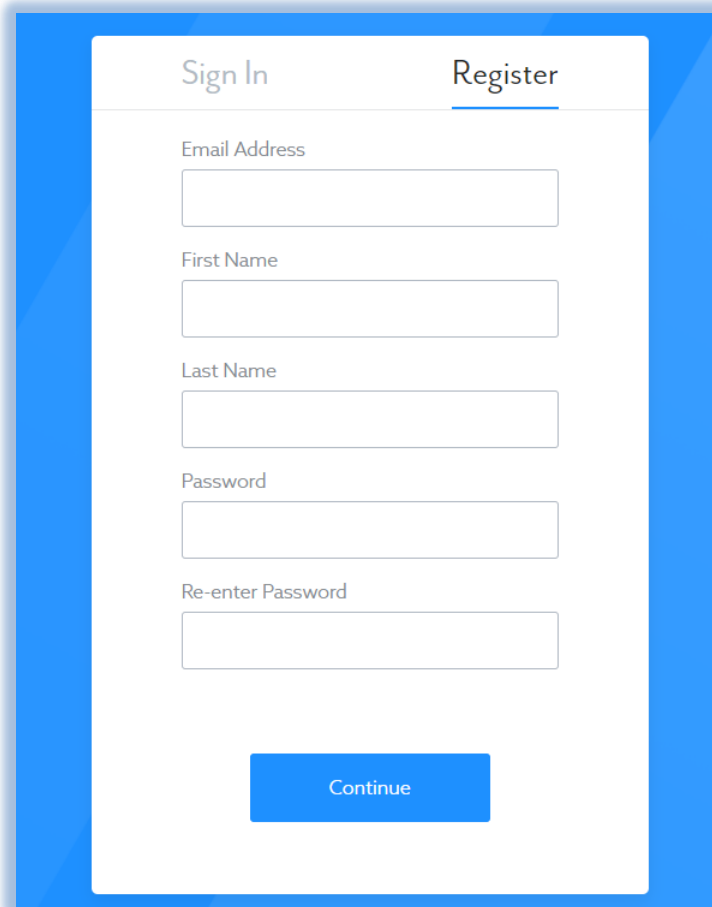
Sign In

[Forgot your Password?](#)

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 user name (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.

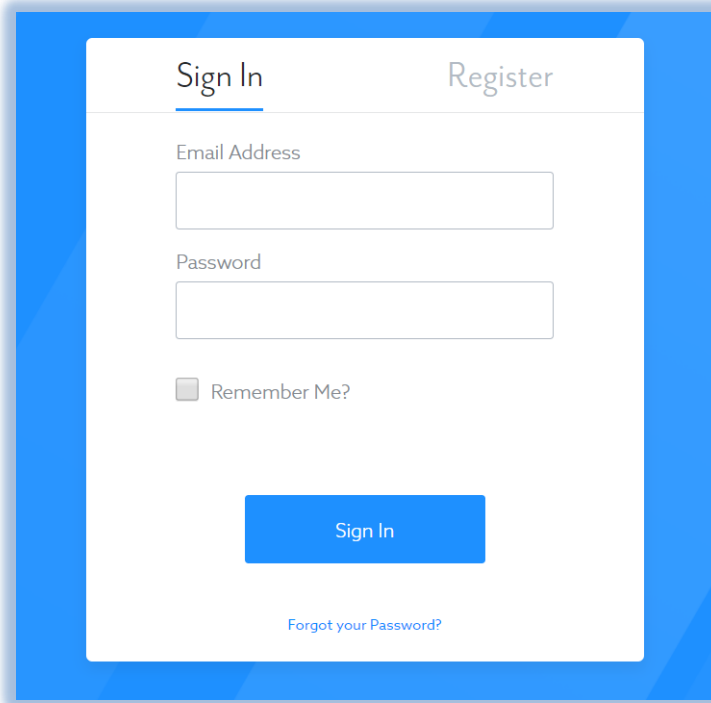
Note: If you do not receive the system email within 2 minutes, check your spam or bulk mail folder. If the email appears in that folder, you should right click on the email to indicate "Not Junk" or "Not Spam" to ensure you receive any other system notifications.

A screenshot of a web registration form. The form is white with a blue border and a blue header bar. The header bar has two tabs: "Sign In" and "Register", with "Register" being the active tab. Below the tabs are five input fields: "Email Address", "First Name", "Last Name", "Password", and "Re-enter Password". Each field is a simple white rectangle with a thin blue border. At the bottom of the form is a blue button with the text "Continue" in white.

Sign In	Register
Email Address	
<input type="text"/>	
First Name	
<input type="text"/>	
Last Name	
<input type="text"/>	
Password	
<input type="password"/>	
Re-enter Password	
<input type="password"/>	
<input type="button" value="Continue"/>	

Logging In


Once your account has been registered, you may login (using the same link above) 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).

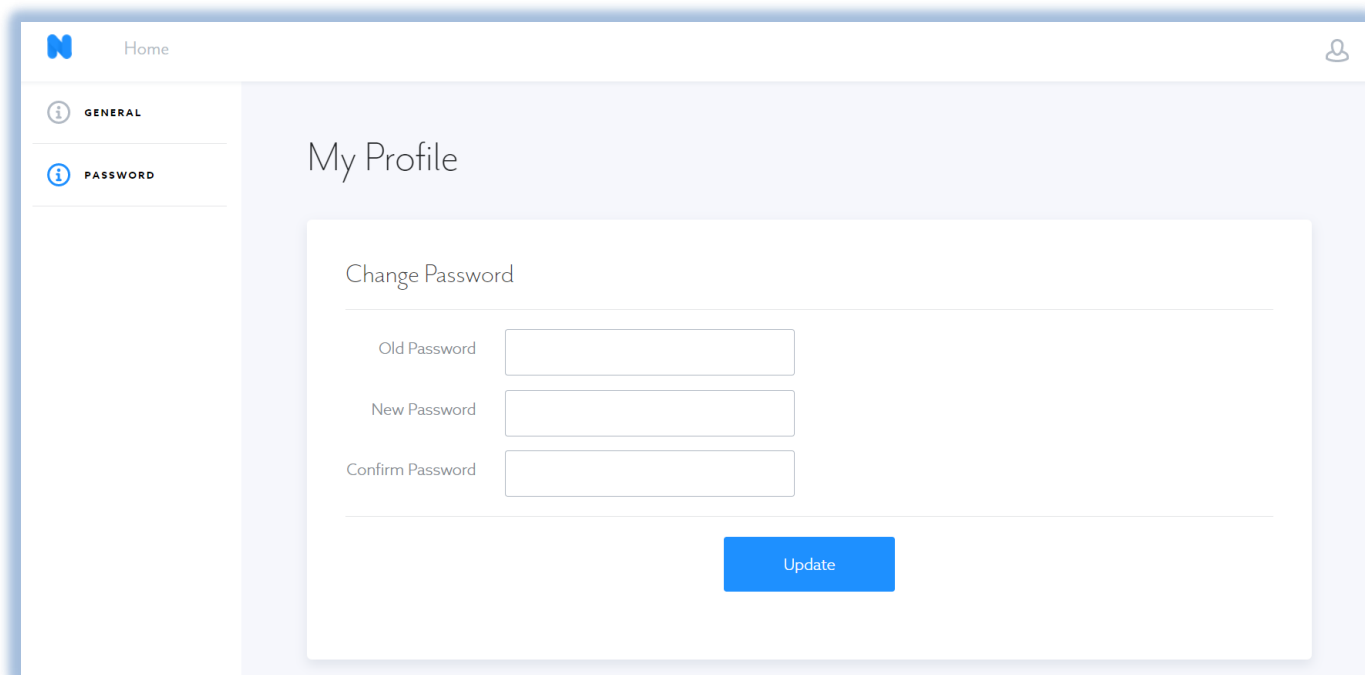
A screenshot of a web form for logging in or registering. The form has two tabs at the top: "Sign In" (which is underlined) and "Register". Below the tabs are two input fields: "Email Address" and "Password". Below the "Password" field is a checkbox labeled "Remember Me?". At the bottom of the form is a blue button labeled "Sign In". Below the button is a link that says "Forgot your Password?". The entire form is set against a blue background with a subtle geometric pattern.

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.



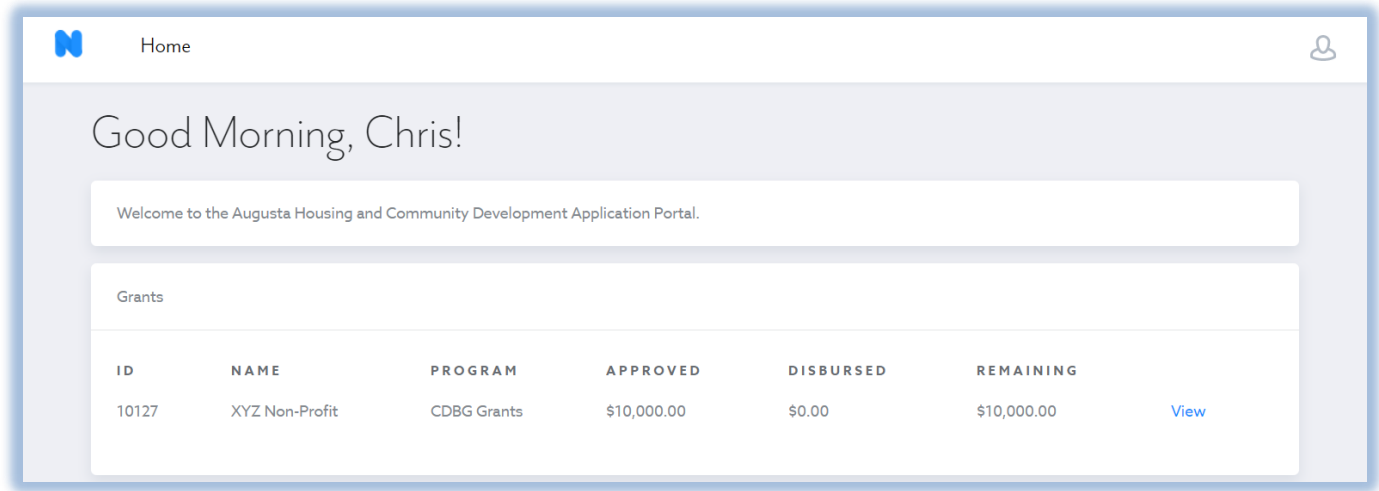
The screenshot shows the 'My Profile' page. On the left is a sidebar with two tabs: 'GENERAL' and 'PASSWORD'. The 'PASSWORD' tab is selected. The main content area is titled 'My Profile' and contains a 'Change Password' form. The form has three input fields: 'Old Password', 'New Password', and 'Confirm Password'. Below these fields is a blue 'Update' button.

Signing Out

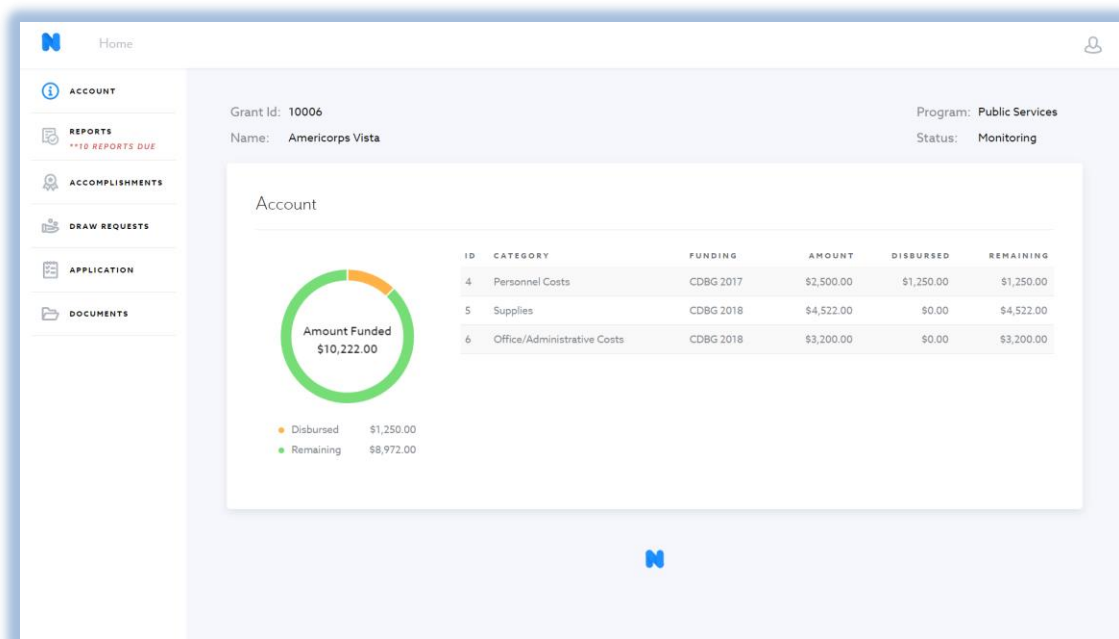
To sign out (aka log out) of the system, click on the  icon on the top right corner of the screen and select “Sign Out”.

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.

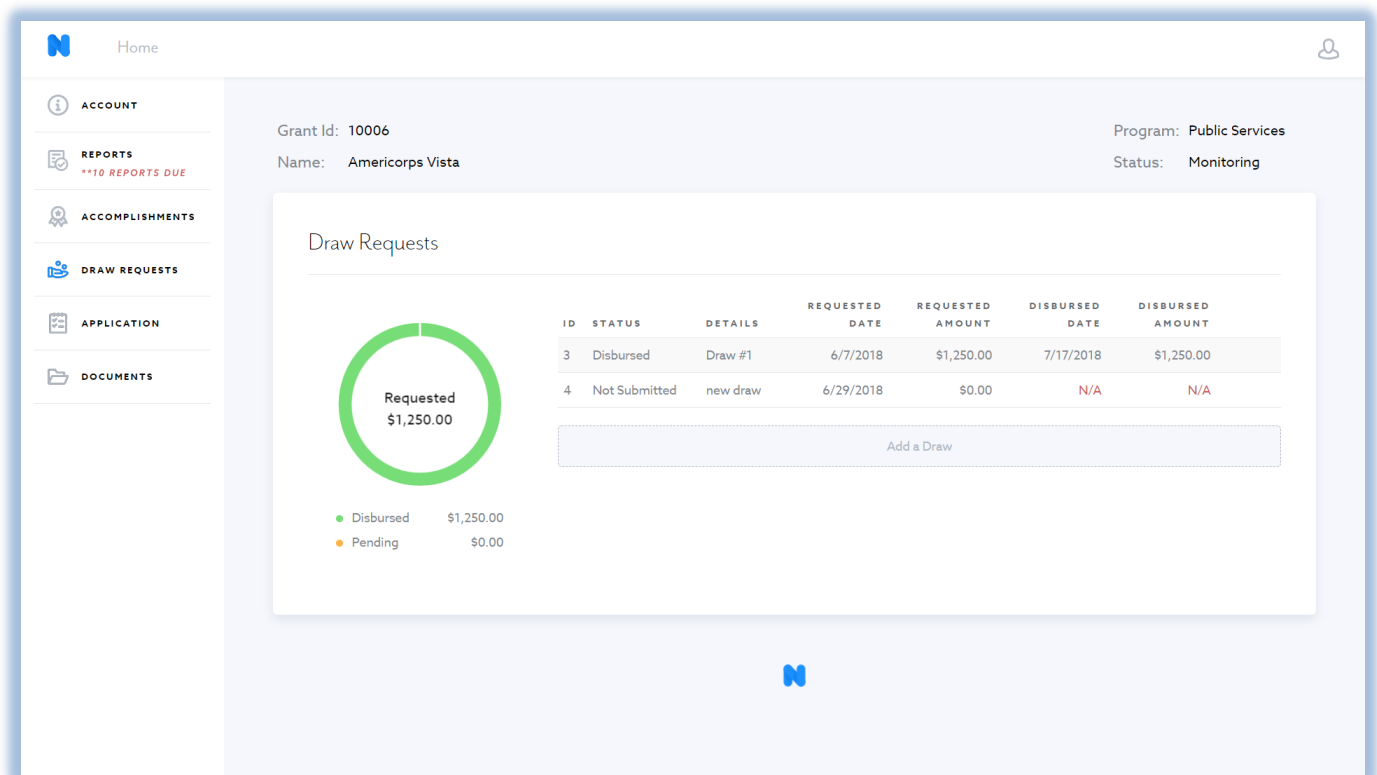


Once loaded, you’ll see the Grant account screen has 6 tabs: Account, Reports, Accomplishments, Draw Requests, Application and Documents. The Account screen is a summary of your Grant account, including the award amount, the funds disbursed, and the remaining account balance.



Submitting a Draw Request

The Draw Requests allows 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 an existing draw, click on the  icon to the right of the draw. To create a new draw, click the “Add a Draw” link.



The screenshot shows the Neighborly Software interface for submitting a draw request. The left sidebar contains navigation links: ACCOUNT, REPORTS (with a note **10 REPORTS DUE), ACCOMPLISHMENTS, DRAW REQUESTS (highlighted), APPLICATION, and DOCUMENTS. The main content area displays the following information:

- Grant Id: 10006
- Name: Americorps Vista
- Program: Public Services
- Status: Monitoring

The "Draw Requests" section features a donut chart showing the requested amount of \$1,250.00. Below the chart, a legend indicates:

- Disbursed: \$1,250.00
- Pending: \$0.00

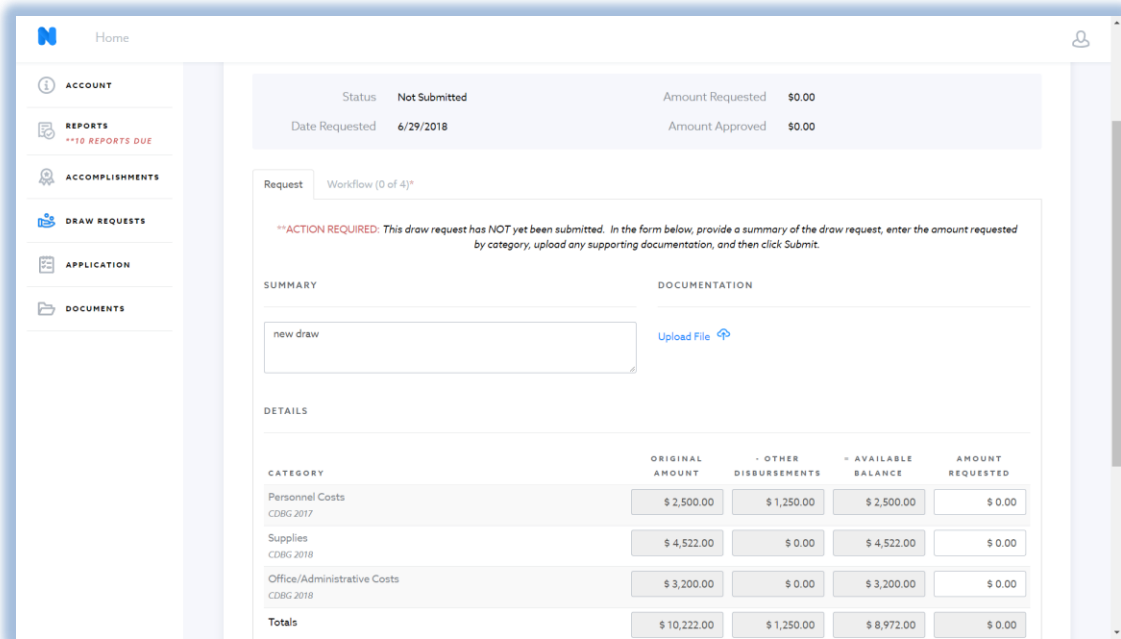
A table lists the draw requests:

ID	STATUS	DETAILS	REQUESTED DATE	REQUESTED AMOUNT	DISBURSED DATE	DISBURSED AMOUNT
3	Disbursed	Draw #1	6/7/2018	\$1,250.00	7/17/2018	\$1,250.00
4	Not Submitted	new draw	6/29/2018	\$0.00	N/A	N/A

Below the table is a button labeled "Add a Draw".

When requesting a draw, provide a brief description of the draw request, the amount requested by budget “Category”, and attach any supporting documents as necessary. The draw request will be forwarded to the entitlement jurisdiction for review and approval/denial. You can track the draw request review process by

clicking on the “Workflow” tab.



The screenshot shows the Neighborly Software interface. On the left is a sidebar with navigation links: ACCOUNT, REPORTS (with a red notification '10 REPORTS DUE'), ACCOMPLISHMENTS, DRAW REQUESTS, APPLICATION, and DOCUMENTS. The main content area is titled 'Home' and shows a 'Request' workflow (0 of 4). At the top, a summary box displays: Status: Not Submitted, Amount Requested: \$0.00, Date Requested: 6/29/2018, and Amount Approved: \$0.00. Below this, a red message states: '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.' The form is divided into two sections: SUMMARY and DOCUMENTATION. The SUMMARY section has a text input field containing 'new draw'. The DOCUMENTATION section has an 'Upload File' button with a paper plane icon. Below these sections is a 'DETAILS' table with columns: CATEGORY, ORIGINAL AMOUNT, OTHER DISBURSEMENTS, AVAILABLE BALANCE, and AMOUNT REQUESTED. The table lists three categories: Personnel Costs CDBG 2017, Supplies CDBG 2018, and Office/Administrative Costs CDBG 2018, followed by a Totals row.

CATEGORY	ORIGINAL AMOUNT	OTHER DISBURSEMENTS	AVAILABLE BALANCE	AMOUNT REQUESTED
Personnel Costs CDBG 2017	\$ 2,500.00	\$ 1,250.00	\$ 2,500.00	\$ 0.00
Supplies CDBG 2018	\$ 4,522.00	\$ 0.00	\$ 4,522.00	\$ 0.00
Office/Administrative Costs CDBG 2018	\$ 3,200.00	\$ 0.00	\$ 3,200.00	\$ 0.00
Totals	\$ 10,222.00	\$ 1,250.00	\$ 8,972.00	\$ 0.00