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**REGISTERING FOR SOFTWARE**

**THIS SECTION WILL HELP YOU SET UP AN ACCOUNT IF YOU HAVE NEVER ACCESSED THE SYSTEM BEFORE. EACH USER SHOULD HAVE THEIR OWN LOG-IN AS ALL ACTIVITIES IN THE SYSTEM WILL BE ATTRIBUTED TO THE USER AND DOCUMENTED IN THE OFFICIAL AUDIT LOG.**

1. Access the website at: https://portal.neighborlysoftware.com/meridianid/Participant/Login and bookmark it.
2. Select the “Register” tab.
3. Complete the form and select “Continue”.

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New applicants must first register their account before signing in to the portal.

Technical issues email: support@neighborlysoftware.com
ACCOUNT

THIS SECTION SHOWS HOW TO REVIEW THE OVERALL BUDGET.

1. From the left-hand navigation pane select the “Account” tab. On this screen you can review the following:
   a. Amount funded – total amount funded as well as the breakdown of funds that have been disbursed or are pending
   b. Category – breakdown of eligible activities
   c. Funding – source of funding (e.g. PY20)
   d. Amount – amount funded in each category
   e. Disbursed – amount disbursed by category
   f. Remaining – remaining balance by category
REPORTS

THIS SECTION WILL SHOW HOW TO SUBMIT REQUIRED REPORTS.

PROGRESS REPORTS

Progress reports are required at regular intervals throughout the lifetime of your grant. The subrecipient agreement will specify how often you are required to submit your progress report.

1. From the left-hand navigation pane select the “Reports” tab.

2. The Reports tab will automatically go to Progress Report. Select “Start”.

---

**ACCOUNT**

<table>
<thead>
<tr>
<th>ID</th>
<th>CATEGORY</th>
<th>FUNDING</th>
<th>AMOUNT</th>
<th>DISBURSED</th>
<th>REMAINING</th>
</tr>
</thead>
<tbody>
<tr>
<td>40</td>
<td>Direct Client Services (Staff Time)</td>
<td>Test</td>
<td>$50,000.00</td>
<td>$0.00</td>
<td>$50,000.00</td>
</tr>
<tr>
<td>39</td>
<td>Other</td>
<td>Test</td>
<td>$30,000.00</td>
<td>$12,000.00</td>
<td>$18,000.00</td>
</tr>
</tbody>
</table>

**Account**

- Disbursed: $12,000.00
- Remaining: $68,000.00
3. A pop-up will ask if you want to start the report. Select “Proceed”.

4. Enter the progress, difficulties encountered, and planned activity next period for each goal that is listed. Updates should be specific to this reporting period. Note: actual goals will vary by project.

5. Select “Complete & Continue.”
7. Complete all accomplishments listed.
   The subrecipient agreement will specify if you should be reporting based on the number of households or the number of individuals. Be sure to know which you should be reporting on as this is submitted to HUD.
   Note: actual accomplishments will vary by project.
8. Select “Complete & Continue”.

10. If there are supporting documents to include select “Upload” and attach them from your computer.
    Note: most progress reports will not require supporting documents.
11. Select “Complete & Continue”.
12. Select “Submit” tab.
13. Read certification and enter your name in the signature line.  
   Note: Do not sign for someone else.
14. Select “Complete & Submit.”

**FINAL REPORT**

**THE FINAL REPORT IS DUE 15 DAYS AFTER THE END OF THE GRANT PERIOD.**

1. From the left-hand navigation pane select the “Reports” tab.

3. Select “Start”.

4. A pop-up will ask if you want to start the report. Select “Proceed”.

![Image of software interface with steps highlighted]
5. Provide responses in fields provided.
6. Select “Complete & Continue”.

Final Report
Please provide the following information:

- How does the completed project compare to the Level of Service stated in Section 1 of the Subrecipient Agreement? Include the number of units at completion, goal comparisons, an analysis of project, and major milestones.

- Enter the amount of funding provided by each of the sources listed. Be sure to include other funds that were leveraged to complete this project.

<table>
<thead>
<tr>
<th>FUNDING SOURCE</th>
<th>AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>CDBG</td>
<td>$0.00</td>
</tr>
<tr>
<td>State Federal</td>
<td>$0.00</td>
</tr>
<tr>
<td>State</td>
<td>$0.00</td>
</tr>
<tr>
<td>Local</td>
<td>$0.00</td>
</tr>
<tr>
<td>Other</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

No new history.

[Complete & Continue button]
7. Select the “Closeout Certification” tab.
8. Complete all fields.
9. Select “Complete & Submit”.
ACCOMPLISHMENTS

THIS SECTION WILL SHOW HOW TO VIEW THE MONTHLY AND CUMULATIVE NUMBER SERVED.

1. From the left-hand navigation pane select the “Accomplishments” tab.
2. Accomplishments will be listed by month and will show the total for all months combined.
3. To export click on the excel icon.

DRAW REQUESTS

THIS SECTION WILL SHOW HOW TO CREATE A DRAW REQUEST.

1. From the left-hand navigation pane select the “Draw Requests” tab.
2. Select “Add a Draw”.
3. The Request Date will automatically populate. In the “Description” field enter the timeframe of your request (e.g. June 2020 Expenses).
4. Select “Add”.
5. Select “Upload” and choose the file from your computer.
6. Enter the correct amount in the “Amount Requested” field.
7. Click out of box to make sure the correct amount shows in the “Totals” field.
8. Select “Submit”.

9. On the pop-up select “Proceed” if the amount is correct. If not, select “Cancel” and correct the amount.
STATUS OF DRAW REQUEST

AFTER SUBMITTING A REQUEST IT IS POSSIBLE TO CHECK ON THE STATUS. BELOW WILL SHOW WHERE TO VIEW THE STATUS AS WELL AS THE MEANING OF THE STATUS.

1. From the left-hand navigation pane select the “Draw Requests” tab. The system will take you to an overview of the budget.

2. The status will tell where the request is in the process:
   - Submitted – request has been submitted and is awaiting review by CDBG staff
   - Pending Approval – request has been approved by CDBG staff and is awaiting Department approval
   - Approved – request has been approved by the Department and has been sent to Finance for final review before being submitted to Council
   - Disbursed – request has been approved by Council and the payment is being processed or has already been paid
APPLICATION

THIS SECTION WILL PROVIDE INFORMATION ON VIEWING THE APPLICATION FOR THE ASSOCIATED GRANT.

1. From the left-hand navigation pane click on the “Application” tab.
2. Select the section you would like to view from the left-hand navigation pane to view that section of the application.

**USERS**

THIS SECTION WILL SHOW HOW TO ADD AN ADDITIONAL PERSON TO A PROJECT. ADDING USERS WILL ALLOW: MULTIPLE PEOPLE TO COLLABORATE ON AN APPLICATION, FINANCIAL PERSON TO COMPLETE A REIMBURSEMENT REQUEST, ABILITY TO ASSIGN TASKS, ETC. NOTE: CITY STAFF MAY BE INCLUDED IN THE “USERS” LIST SO THEY ARE ABLE TO VIEW THE PROJECT FROM YOUR PERSPECTIVE AND PROVIDE TECHNICAL ASSISTANCE.

1. From the left-hand navigation pane select the “Users” tab.
2. Select the “Add a User” button.

3. In the pop-up box, enter the email address.
4. Select the “Add” button.

NEED HELP?
Contact Crystal Campbell at ccampbell@meridiancity.org or (208) 489-0575.