

Subrecipient User Guide:

Miami-Dade County Homeless Trust

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Benevate, Inc.

dba Neighborly Software

Logo

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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.

**Participant Portal Link:** <https://portal.neighborlysoftware.com/MIAMIDADECOUNTYFL-HOMELESSTRUST/Participant>

# Registration

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To access the system, you'll need to create an account by first registering your email address. Select the Register tab and enter your work email address. Select “Send verification code”. To verify your email address, the system will send you an email with a verification code.

**Note:** If you do not receive the email within 2 minutes, check your spam or junk mail folders. If the email is in either folder, mark the message as "Not Junk" or "Not Spam" to ensure you receive all future system notifications.

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Enter the verification code into the text box and click "Verify Code."

If the code is not accepted, you may generate a new code by selecting "Send new code." Another email with a new code will be sent to your inbox.

After verifying your email address, you'll be prompted to create a password. Passwords should be at least 12 characters long and include at least one UPPERCASE letter, lowercase letter, a number, and a special character (!@#$%^).

# Signing 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.

A screenshot of a login form

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# A screenshot of a login page Description automatically generated with medium confidencePassword Reset

If you forget your password, select the link “Forgot your Password?” and follow the prompts to create a new password.

Enter the email address that was used to register your account. Then select “Send Verification Code”

Within a few seconds, the system will send you an email containing a 6-digit code. Enter the code into the text field and select “Verify Code”

If after 2 minutes you have not received a code, you may repeat these steps to generate another code.

Be sure to check your spam and junk folders before requesting a new code. Sometimes users do not receive the code due to a simple typo when entering their email address. Verify that the email entered is indeed correct.

# A screenshot of a phone Description automatically generated with medium confidenceChanging your Password

To change your password, log into the Participant Portal. Select the icon on the top right corner of the screen and select “My Profile”. Next, select the “Password” option on the left side of the screen. For security purposes, you will be required to enter your email address, the system will then send you a verification code. Enter the code and follow the prompts to create a new password.

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# Managing your Grant Account

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## Account

The Grant Viewer has 6 main sections: 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.

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## Accomplishments

The Accomplishments screen provides a summary of Accomplishment data entered via Scheduled Monthly and Annual Reports. Note that this screen is Read Only – accomplishment data can only be added/modified via the Monthly and Annual reports.

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## Draw Requests

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, select the  icon to the right of the draw. To render a PDF of the Draw Voucher, select the  icon.

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### Submitting a New Draw

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To create a new draw, select the “Add a Draw” bar.

The system will default the “Request Date” to today’s date; however you will have the ability to update the date by clicking on the text box and using the date picker to select a new date.

Enter a description/summary of the draw. You will have the ability to update the details further on the next page.

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Once the draw has been created, you may update the summary and upload documents. In the “Details” portion of the page, you will then enter the funds requested from each of the budget categories listed. 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.

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You may track the draw request review process by selecting the “Workflow” tab. You may also render a PDF of the Draw Request by selecting the  Icon in the upper right.

# Scheduled Reports

The Reports tab will indicate if any reports are Due or Past Due. Once you click into the Reports section, you will find all the reports that have been scheduled for your organization. Most often, these will be labeled as Monthly or Quarterly Reports.

To start a report, select the three-dot icon to the right of the report, and then select “Start”. Note that Reports are not available to be started/completed until the reporting period has passed.

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Once inside a report, you will see multiple tabs depending on your grant program. Usually there are at least 3 tabs – one for reporting Goal progress, one for Accomplishment data and one to certify and Submit the report.

Complete each tab by clicking the “Complete and Continue” button at the bottom of the screen. You may also Save your work to return to the report later.

Steps can be reopened by selecting the “Reopen” button at the bottom of the page. The report is not Complete and Submitted until all tabs are individually marked Complete. Once the report has been fully completed and submitted it will no longer be available for any further edits or changes unless reopened by a Program

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# Tasks

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Once inside the task, view the details and complete the request. You may upload any supporting files by selecting the “Upload File” hyperlink.

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Description automatically generated with low confidenceAdditionally, if there are follow up questions regarding the task, you may send a message in the task to the Program Administrator who originally assigned the task. Select the Messages Tab, enter a detailed message in the text area, then select the  icon to post the message. You will be notified via email once a response has been posted. Once the task has been completed, select the “Mark Task Complete” button.

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If at any point you run into technical difficulties with the software, use the help icon located in the bottom right corner of your screen to contact our Support Team. Support is available Monday – Friday from 8am to 7pm Eastern Time.