Key Terms

Administrator. An individual that has the ability to create and edit data records, run reports, and generate program documents in the system.

Participant/Beneficiary. A third-party individual that is receiving funds from a program.

Sub-recipient. A third party, typically a non-profit, that is receiving funds to administer programs in the local community.

Program. Describes an eligible activity and its associated workflow in the system. Examples of "Programs" include down payment assistance, owner occupied rehab, public service grants, property demolition, etc.

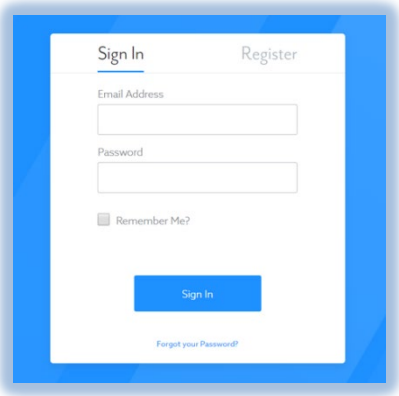
Case. An individual instance of a program in the system. Examples include: An individual/household participating in down payment assistance program, a property in the property demolition program.

Case Status. The phases of a case lifecycle tracked in the software (e.g. Apply, Withdrawn, Denied, Monitor, Default, Complete). Case statuses are unique to each program.

Funding Source. Represent the highest level of the financial hierarchy in the system, and would include sources such as ESG, HOME and State or Local based funds.

Funding Period. Represents the second level of the financial hierarch in the system. Budgets are tied to a specific Funding Source and represent a specific use of funds from that Funding Source. Often funding periods are fiscal year based (i.e. CDBG 2017, CDBG 2018, etc) and/or can be further identified to a specific use (i.e. CDBG 2017 Activity Delivery Costs, CDBG 2017 Rehab Funds, etc).

Getting Started

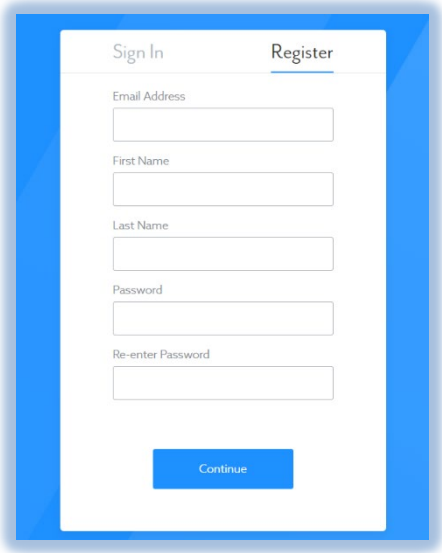


Accessing the Participant Portal

The Participant Portal is hosted by Neighborly Software and is accessible via any internet connected device. The recommended browser is Google Chrome but will work with any modern web browser (i.e. Microsoft Edge, FireFox, Safari).

Participant Portal Link:
https://portal.neighborlysoftware.com/AuroraCO/Participant

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 email address) and password that will be used for future logins. The email address you choose will also be used for system emails/notifications, so it is recommended to use your work email address. 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. Occasionally, for new clients, we may need to work with the IT/Email Administrator to ensure spam filtering does not inadvertently block valid system messaging.

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.

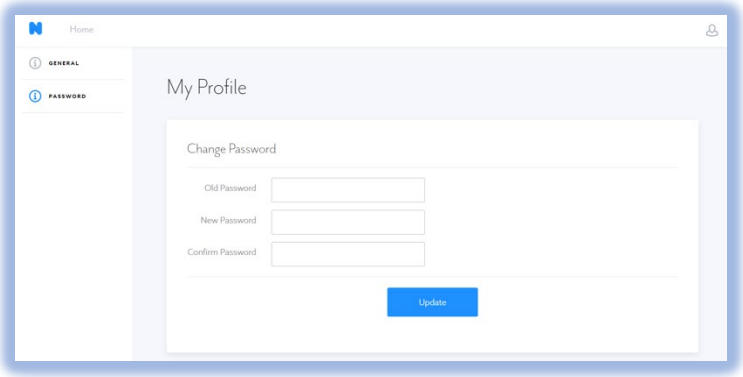
Forgot your Password

If you forget your password, click on the link at the bottom of the login screen 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

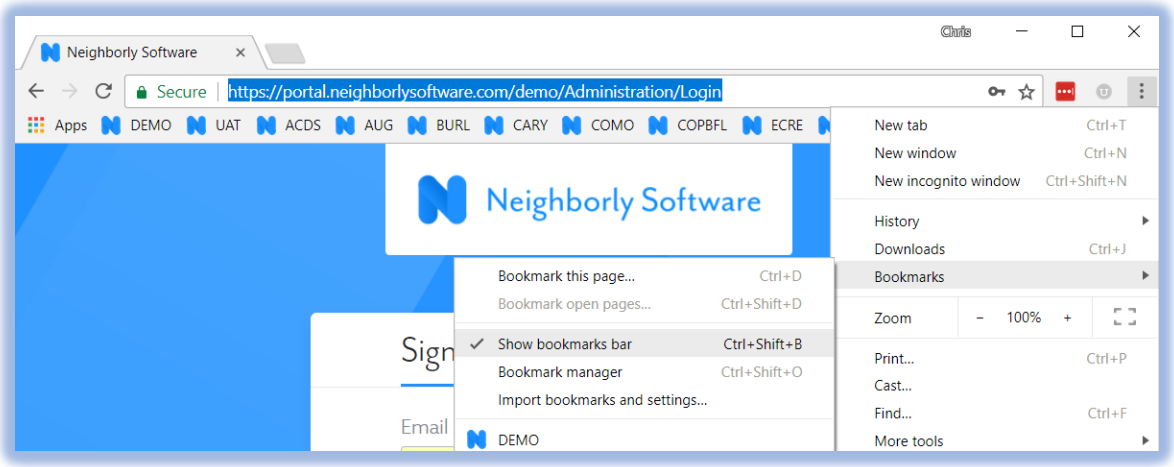
To change your password, log into the Participant Portal.



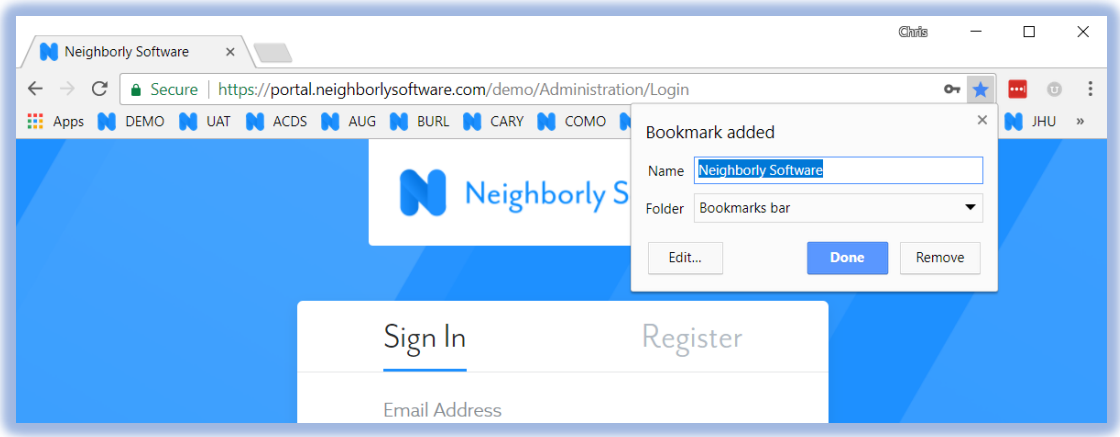
Signing Out

Creating a Desktop Link (with Google Chrome)

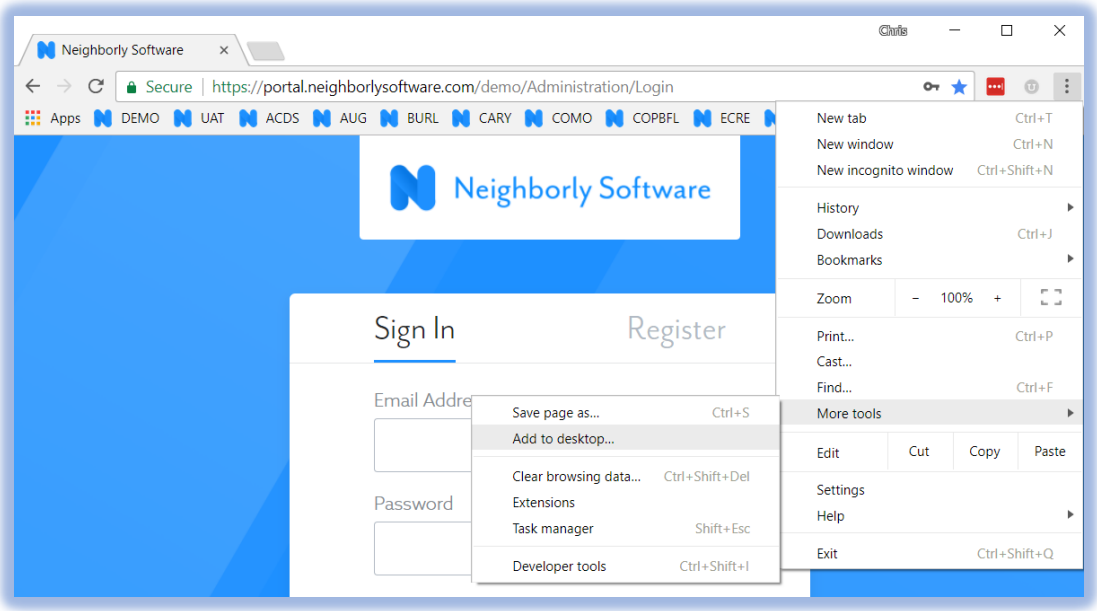
1. Launch Google Chrome (recommended browser for Neighborly Software)
2. Copy and Paste the Participant Portal link into the Google Chrome navigation bar
3. Create a bookmark on the bookmarks bar
    a. First, ensure your bookmarks bar is enabled: Click on the icon with the three vertical dots to the right of the navigation bar (see image below). Make sure Show bookmarks bar is checked.



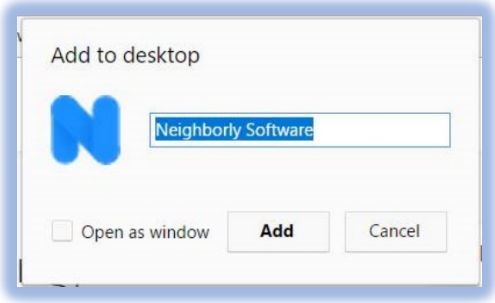
b. Next, we'll create the bookmark: To the right of the navigation bar, click the star icon to create a new bookmark. Ensure the "Folder:" is Bookmarks bar.



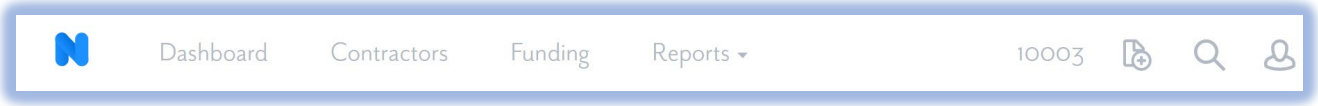
4. Now we can create a desktop icon link to the application. Click again on the icon with the three vertical dots, but this time, highlight More tools and then Add to desktop:



5. You should see a popup box similar to below. Create a shortcut name and click Add. Once complete, the icon should appear on your desktop.



Navigating the Portal



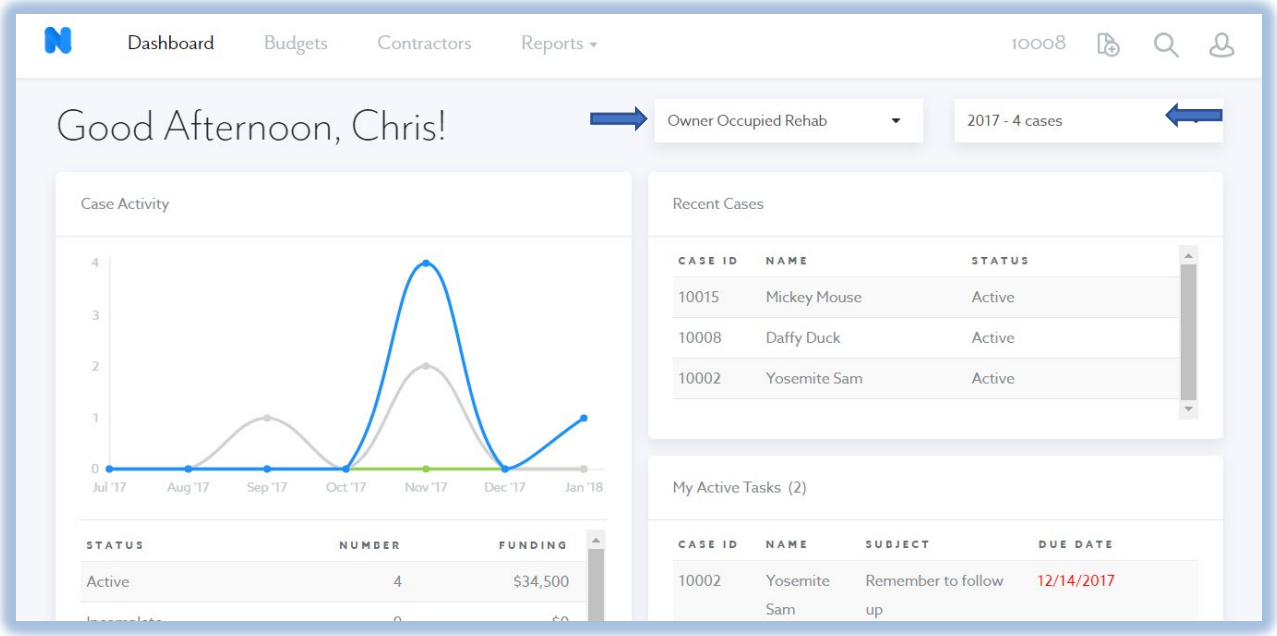
Once you are logged into the portal, you'll be taken to the Dashboard. At the top of the screen is the Navigation Bar. The navigation bar is the primary way to navigate through the different modules in the portal. This navigation bar will be present throughout the system. Note that not all navigation options are available to all participants (role-based security.) You *cannot* use the browser's back and forward buttons within the application. Rather, use the links within the tool to navigate forward and backward.

Once a case is loaded, you'll see the Case ID appear in the top-right hand corner of the screen (10003 above). Users can click into other sections of the

application (i.e. Dashboard, Contractors, Budgets, Reports) and return to the Case in the same place they left off by clicking on the Case Id link.

Dashboard

The dashboard provides high level information about the selected program. Information about applications, funding, recent cases and active tasks can be found on the Dashboard screen. The administrator can change programs and funding years by selecting different options in the dropdown boxes at the top of the page.



Screenshot: Dashboard, highlighting Program and Year Selection Options

Accessing the User Guide & requests for support

At the very top right corner of the screen is a help icon that will take you to the User Guide and Support page in the software.

From this page you can view the different sections within the participant guide and view the section corresponding best with your needs. If you're unable to find what you're looking for you can open a support ticket from the same page using the Help Icon at the bottom right of the screen.

Please provide a detailed description, referencing specific case IDs where applicable and upload any documentation or screenshots to support your ticket. Once you click submit someone from our support staff will follow up and begin working on your ticket.