



## **PARTICIPANT USER GUIDE**

### **Neighborly Software**

**07/15/2025**

**County of San Luis Obispo  
Department of Social Services  
Homeless Services Division  
P.O. Box 8119  
San Luis Obispo, CA 93403-8119**

**[SS\\_HSDInfo@co.slo.ca.us](mailto:SS_HSDInfo@co.slo.ca.us)**

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## Accessing the Participant Portal

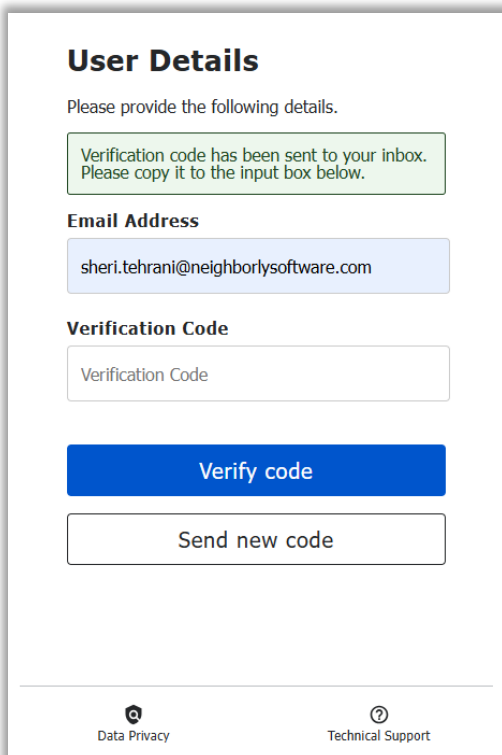
The Participant Portal is hosted by Neighborly Software and is accessible available via any internet connected device. The recommended browser is Google Chrome, but it will work with any modern web browser.

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

## Registration

To access the system, you'll need to create an account by first registering your email address. Select "Sign up Now" 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 two 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.



**User Details**

Please provide the following details.

Verification code has been sent to your inbox.  
Please copy it to the input box below.

**Email Address**

sheri.tehrani@neighborlysoftware.com

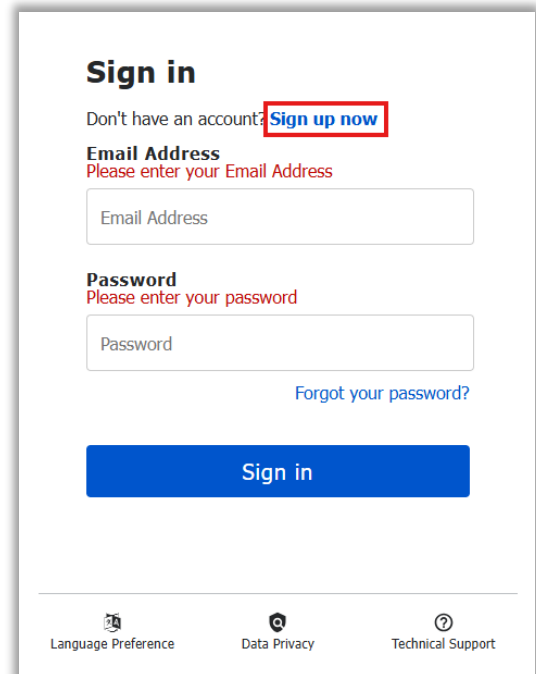
**Verification Code**

Verification Code

**Verify code**

**Send new code**

[Data Privacy](#) [Technical Support](#)



**Sign in**

Don't have an account? [Sign up now](#)

**Email Address**  
Please enter your Email Address

Email Address

**Password**  
Please enter your password

Password

[Forgot your password?](#)

**Sign in**

[Language Preference](#) [Data Privacy](#) [Technical Support](#)

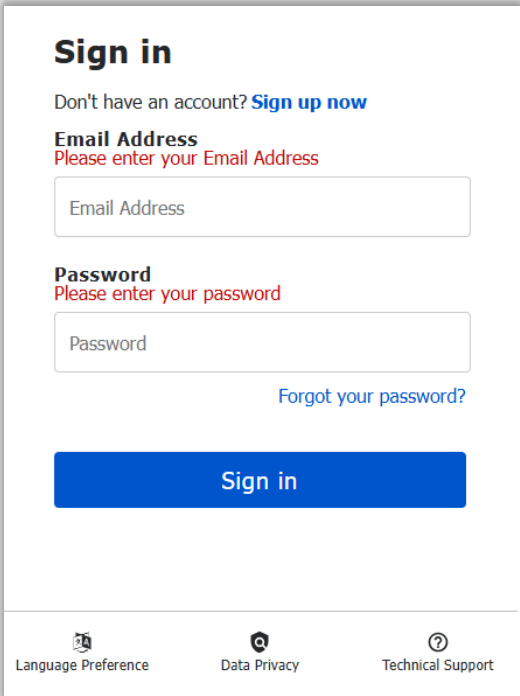
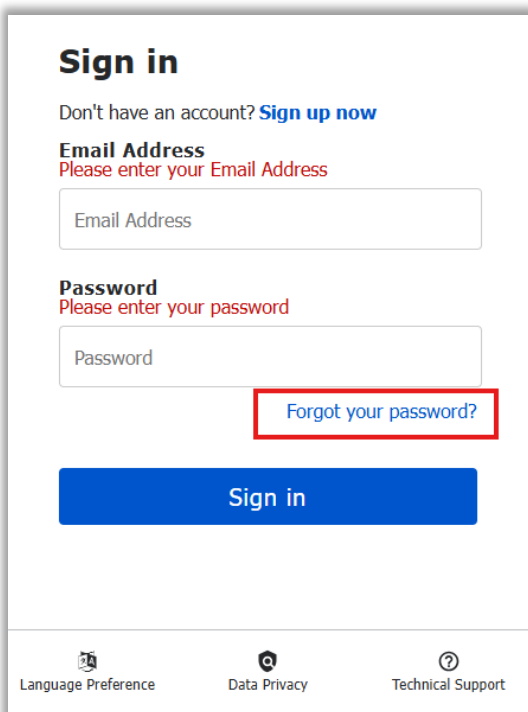
Enter the verification code into the text box and click "Verify Code."

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 the 'Sign in' form. At the top, it says 'Sign in' in bold. Below that, a link 'Don't have an account? Sign up now' is shown. The form has two input fields: 'Email Address' and 'Password', each with a red prompt 'Please enter your Email Address' and 'Please enter your password' respectively. A blue link 'Forgot your password?' is located below the password field. A large blue 'Sign in' button is at the bottom. The footer contains three links: 'Language Preference', 'Data Privacy', and 'Technical Support'.A screenshot of the 'Sign in' form, identical to the one above, but with the 'Forgot your password?' link highlighted by a red rectangular box. The form includes the 'Sign in' title, a 'Sign up now' link, email and password input fields with red prompts, the 'Forgot your password?' link, a blue 'Sign in' button, and a footer with three links: 'Language Preference', 'Data Privacy', and 'Technical Support'.

## Password Reset

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

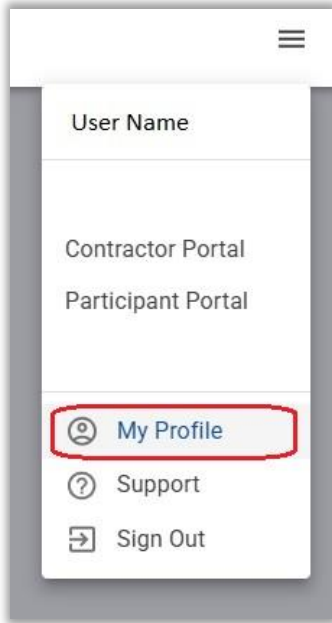
Enter the email address that was used to register your account. Then select “Send Verification Code.”

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 two 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.

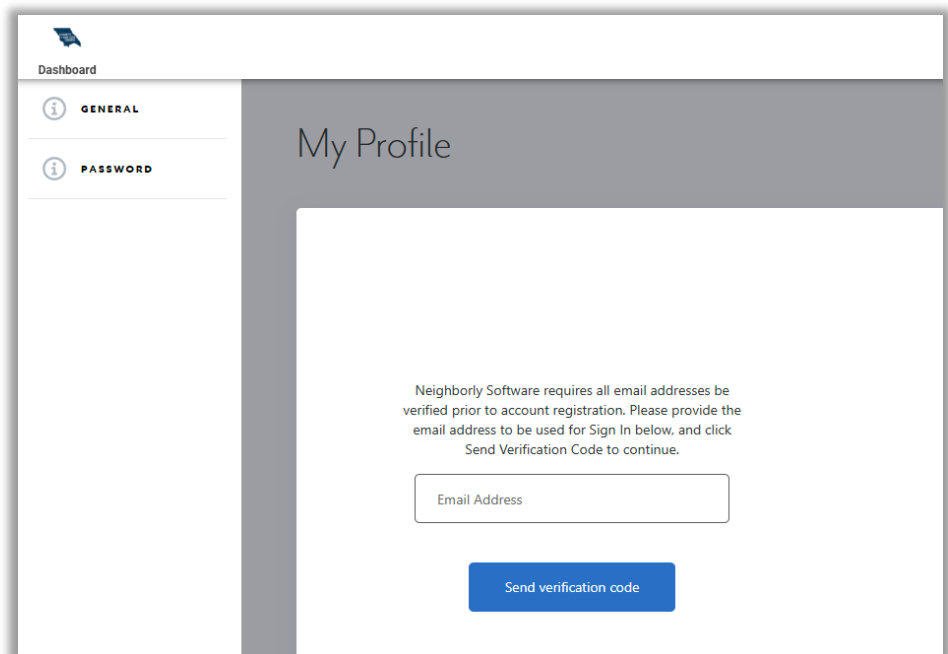
## Changing your Password



To change your password, log into the Participant Portal.

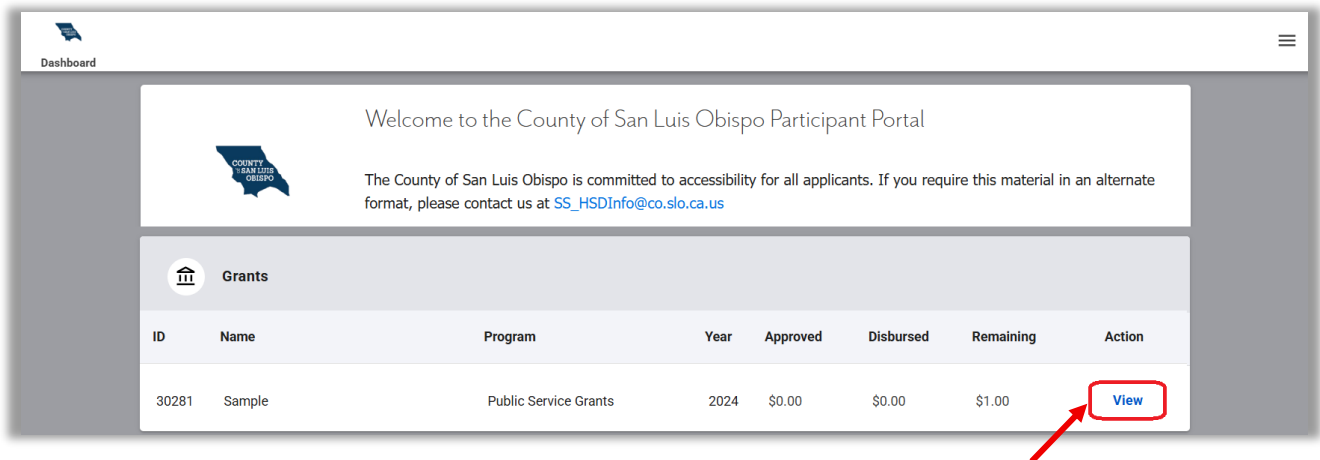
Select the menu  in the top right corner of the screen and select "My Profile."

Next, select the "Password" option on the left side of the screen. For security purposes, you will be required to enter your email address and the system will then send you a verification code. Enter the code and follow the prompts to create a new password.



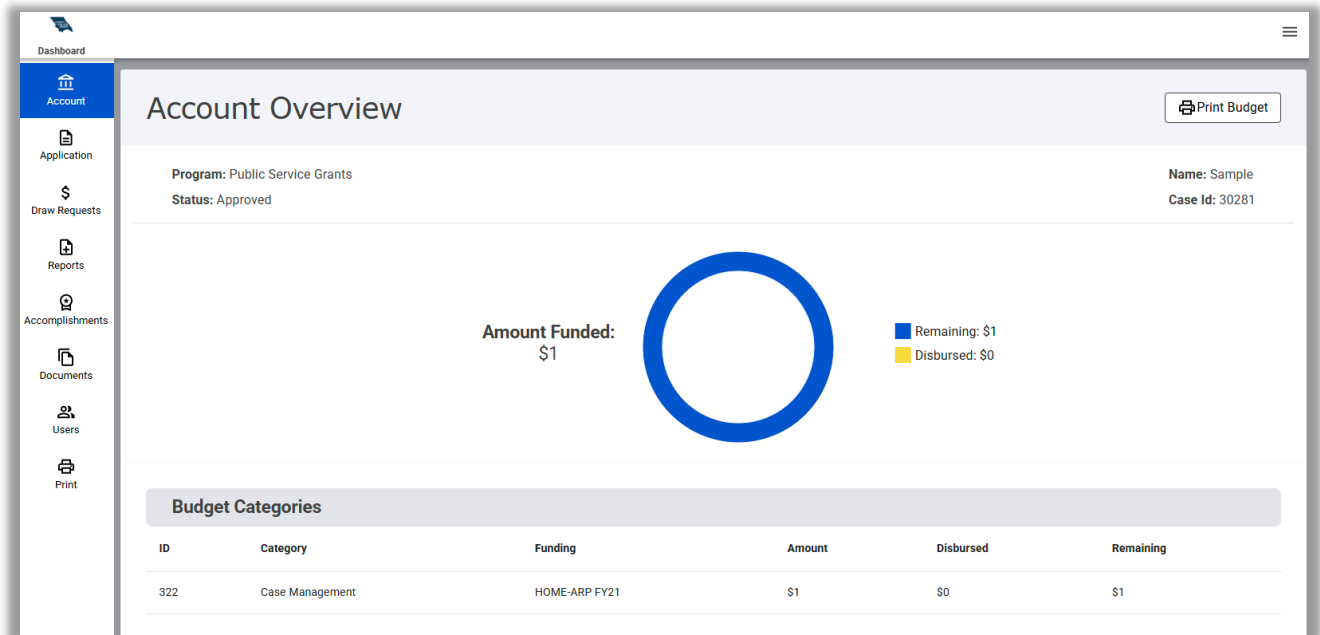
## Managing your Grant Account

Upon logging in, the Participant Dashboard will become visible. Any case where funds have been awarded will be listed in the Grant card as shown below. To load the Grant Viewer, select “View” to load the grant account screen.



## Account

The Grant Viewer has seven main sections: Account, Application, Draw Requests, Reports, Accomplishments, Documents, and Users. The Account screen is a summary of your Grant account, including the award amount, the funds disbursed, and the remaining account balance.



## 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 request, select “View” to the right of the draw.

**Summary**

Public Service Grants  
Status: Approved  
Name: Sample  
Case ID: 30281

**Draw Requests**

Total Requested: \$140,309.15

- Disbursed \$100,000
- Pending \$40,309.15
- Short Paid \$0

ID	Status	Workflow	Detail	Requested Date	Requested Amount	Disbursed Date	Disbursed Amount	
141	Pending Approval	1 of 3	Sample Draw #3	6/19/2025	\$40,309.15	N/A	\$0	<a href="#">View</a>
77	Disbursed	3 of 3	Sample Draw #1	6/19/2025	\$100,000	5/30/2025	\$100,000	<a href="#">View</a>

[Add a Draw](#)

You may track the draw request review process by selecting “Workflow” from the Draw ID dropdown.

**Draw Id: 141**

Print Draw Request

Status: Pending Approval  
Date Requested: 6/11/2025  
Approver Group: Default

Amount Requested: \$40,309.15  
Amount Approved: \$40,309.15

**Workflow (1 of 3 Completed)**

Activity	Date Completed	Completed By
Program Manager	06/18/2025, 2:29:13 PM	gdsolis@co.slo.ca.us
Fiscal Approval	Not yet approved	
Payment Issued	Not yet disbursed	

## Submitting a New Draw

To create a new draw, select

**Add a Draw**

1. The Request Date will default to today's date; however, you can edit by typing in the text box or clicking the calendar icon to select a new date.

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

Select **Add** to continue.

3. Once the draw has been added, you may update the summary/description prior to submitting the draw request.



4. Source documentation and proof of payment(s) must be uploaded prior to submitting the draw request.
5. In the “Details” portion of the page, you will then enter the funds requested from each of the budget categories listed.

6. Select  at the bottom of the page.

Draw Id: 165

Status: Not Submitted

Date Requested: 6/19/2025

Approver Group: Default

Print Draw Request

Amount Requested: \$0

Amount Approved: \$0

\*\*\*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.

Summary

Sample Draw #3

Documentation

Source documents and proof of payment(s) MUST be uploaded prior to submitting this request.

After submitting this request, please print it using the Print Draw Request button, sign it, and upload it in the Documents section. (File type is Draw Request.)

Certification: I am an authorized and qualified official who reviewed any and all expenditures submitted. I hereby certify that the information provided for the period is correct, accurate, reliable, and represents authentic records of time and services provided as required.

Upload File

File Name	Last Modified	Actions
<a href="#">Upload file</a>		

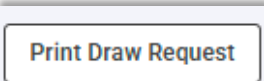
Details

Category	Original Amount	Other Disbursements	Available Balance	Amount Requested	Amount Approved
Case Management	\$1	\$0	\$1	<input type="text" value="\$ 0.00"/>	\$0
Total	\$1	\$0	\$1	\$0	\$0

Cancel

Submit

7. After submitting the draw request, please complete the certification of your draw request.

Select  from the upper right corner of the request page. This will download a pdf of your draw request that includes the certification statement. Read the certification statement at the bottom of the pdf and acknowledge your understanding by completing the name / signature / title / date portion.

8. Upload your signed draw request pdf into the Documents section. Use file type Draw Request when uploading.
9. Once submitted, the draw request and your draw request certification will be forwarded to your County Program Manager 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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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, Quarterly, or Annual Reports.

To start a report, select **Start** to the right of the report. Note that Reports are not available to be started/completed until the reporting period has passed.

Dashboard

Account

Application

Draw Requests

Reports

Accomplishments

Documents

Users

Print

Public Service Grants

Status: Approved  
Name: Sample  
Case ID: 30281

Summary

Id: 411 (Past Due)

Quarterly Report (0 of 1)

ID	Date Range	Available	Due	Status	Report	# Files	Submitted By	Action
411	09/01/2024 - 11/30/2024	11/30/2024	12/15/2024	Past Due	0 of 5 steps completed	0		Start

Once inside a report, you will see multiple steps depending on your grant program. There may be two, three, or more steps labeled “A”, “B”, “C”, etc., plus a final step to “Submit.” Select each step and enter the required information.

Complete each step by selecting **Complete & Continue** at the bottom of the screen. You may also Save your work to return to the report later.

Dashboard

Public Service Grants  
Status: Approved  
Name: Sample  
Case ID: 30281

Quarterly Report (1 of 1)

Print This Step

Summary  
Id: 411 (In Progress)

**A. Goals**

B. Accomplishments

C. Narrative

D. ESG Match

Submit

1. Move people as quickly as possible into permanent housing

Provide rental and deposit assistance to 100 individuals

**Expected Outcome:** 100 Individuals moved into permanent housing

**Response**

**Difficulties**

**Activity Next Period**

No save history

Save

Complete & Continue

Select the step here

Steps can be reopened by selecting the “Reopen” button at the bottom of the page.

Quarterly Report (1 of 1)

### D. ESG Match

Print This Step

Please provide the following information. 1:1 Match Required for ESG

Expenses for the Reporting Period: (Optional)

Funding Source	Amount
Central Bank	\$1.00
	\$1.00

This step was completed by dhawkins@co.slo.ca.us on 6/20/2025 4:36:36 PM

Reopen

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 your County Program Manager.

Accomplishments

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

Dashboard

Account

Application

Draw Requests

Reports

Accomplishments

Documents

Users

Tasks

Print

Accomplishments

Print Accomplishments

Program: Public Service Grants

Status: Approved

Name: Sample

Case Id: 30281

Accomplishment data below is read-only. Changes must be made to the corresponding report.

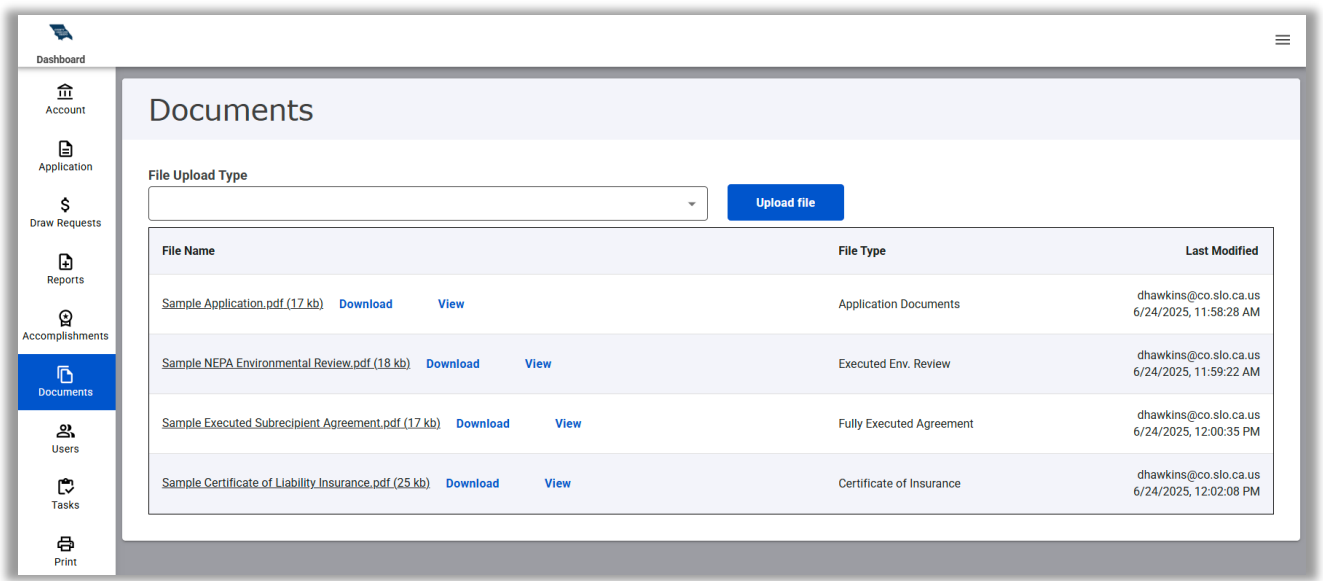
Total Number of Persons Assisted	9/1/2024 - 11/30/2024	12/1/2024 - 2/28/2025	3/1/2025 - 5/31/2025	6/1/2025 - 8/31/2025	Total
Total Number of Unique Persons Assisted this Quarter	111	79	157	0	347
Total	111	79	157	0	347

Accomplishment data below is read-only. Changes must be made to the corresponding report.

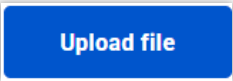
Beneficiaries - Income	9/1/2024 - 11/30/2024	12/1/2024 - 2/28/2025	3/1/2025 - 5/31/2025	6/1/2025 - 8/31/2025	Total
Number of Extremely Low Income persons assisted (<30% AMI)	99	70	156	0	325
Number of Low Income persons assisted (30%-50% AMI)	10	9	1	0	20
Number of Moderate Income persons assisted (50% - 80% AMI)	2	0	0	0	2
Number of persons assisted who are NOT Low to Moderate Income	0	0	0	0	0
Total	111	79	157	0	347

Documents

The Documents screen lists all documents available for Participants to download or view.



Participants may also upload files on this screen by choosing a “File Upload Type” from the dropdown list,




then selecting . A file selection window will open, where you can choose the file to upload from your computer.

Tasks


You may be assigned a task by a County Program Manager. Tasks will be displayed on the Participant Dashboard.

To open a task, select “View Task” to the right of the task.



Welcome to the County of San Luis Obispo Participant Portal

The County of San Luis Obispo is committed to accessibility for all applicants. If you require this material in an alternate format, please contact us at [SS\\_HSDInfo@co.slo.ca.us](mailto:SS_HSDInfo@co.slo.ca.us)

 My Tasks

Show Item Type: Active (1)

Task ID	Case	Subject	Status	Due Date	Action
17	30281: Sample	Missing Budget Details	Active	6/30/2025	<a href="#">View Task</a>

Once inside the task, view the details and complete the request.

You may upload any supporting files by selecting “Upload File”.

Tasks

Details

Messages (0)

Subject:

Missing Budget Details

Owners:

dhawkins@co.slo.ca.us

Details:

Please submit an updated Budget Narrative in your 6/1/2024 to 9/30/2024 Quarterly Report. Please upload to the task. Make sure to mark task as "Complete".

Followers:

Status:

Active

Due Date:

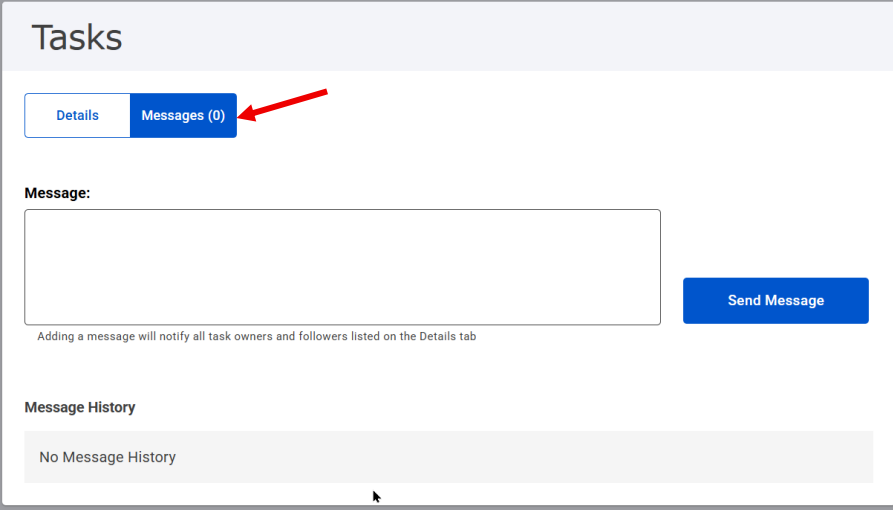
06/30/2025

Attachments

File Name	Last Modified	Actions
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Upload file

Additionally, if there are follow up questions regarding the task, you may send a message in the task to the County Program Manager who originally assigned the task.



The screenshot shows a 'Tasks' interface with two tabs: 'Details' and 'Messages (0)'. A red arrow points to the 'Messages (0)' tab. Below the tabs is a 'Message:' section with a large text input area and a 'Send Message' button. A small note below the input area states: 'Adding a message will notify all task owners and followers listed on the Details tab'. At the bottom, there is a 'Message History' section showing 'No Message History'.

Select the Messages Tab, enter a detailed message in the text area, then select

**Send Message** 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.

## Technical Difficulties

If at any point you run into technical difficulties with the



software, select the menu in the top right corner of the screen and select “Support” to contact the Neighborly Support Team. Support is available Monday – Friday from 8am to 7pm Eastern Time.

