

Welcome to the County of Marin Participant Portal.

Neighborly Software Participant Portal Guide
Instructions for Marin County Grantees and Subrecipients

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Welcome to the County of Marin Neighborly Portal

The County of Marin's Neighborly Software portal is the central online platform for managing all grant-related activities under the Housing and Federal Grants Division. This guide walks you through how to access, manage, and complete grant tasks from start to finish, including applications, draw requests, reports, document uploads, and communication with County staff.

Whether you're a new subrecipient or an experienced grantee, this resource provides clear, step-by-step instructions to help you stay compliant, track progress, and maintain accurate records throughout your project lifecycle within the Neighborly portal.

This guide walks you through how to:

- Create and access your organization's Neighborly account
- Submit funding applications and draw requests
- Upload and organize required documents
- Complete and submit semi-annual and final reports
- Track project status, manage assigned tasks, and communicate with County staff
- Each section of this guide corresponds to a feature in Neighborly and includes:
 - A brief description of the feature
 - Step-by-step instructions with screenshots
 - Notes and best practices for compliance

Getting Started

Navigate to: portal.neighborlysoftware.com/marincountyca/Participant ←

1 If you are an existing user, enter your credentials and click **"Sign In"**

The screenshot shows the County of Marin Participant Portal sign-in page. On the left, there is a yellow circular logo with the County of Marin seal and the text "Welcome to the County of Marin Participant Portal. New users must first sign up before signing into the portal." On the right, there is a sign-in form with the following elements:

- Link: "Don't have an account? [Sign up now](#)"
- Label: "Email Address"
- Input field: "chris.miranda@marincounty.gov"
- Label: "Password"
- Input field: "*****"
- Link: "Forgot your password?"
- Button: "Sign In"
- Footer links: "Language Preference", "Data Privacy", "Technical Support"

2 If you are a new user, click **"Sign Up Now"** to verify your email and set up a password

The screenshot shows the County of Marin Participant Portal sign-in page. On the left, there is a yellow circular logo with the County of Marin seal and the text "Welcome to the County of Marin Participant Portal. New users must first sign up before signing into the portal." On the right, there is a sign-in form with the following elements:

- Link: "Don't have an account? [Sign up now](#)" (highlighted with an orange circle)
- Label: "Email Address"
- Input field: "Email Address"
- Label: "Password"
- Input field: "Password"
- Link: "Forgot your password?"
- Button: "Sign In"
- Footer links: "Language Preference", "Data Privacy", "Technical Support"

— New User - Sign Up

Once logged in, your **dashboard** displays all active and completed tasks assigned to your organization. Access is available only to the email address registered and authorized by the County.

1 Click "Sign up Now"

Sign in

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

Email Address

Password

[Forgot your password?](#)

Sign in

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

2 Enter your email and click "Send Verification Code" Check your inbox for the code and use it to complete your account setup.

User Details

Please provide the following details.

Email Address

Send verification code

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

New User - Email Verification Code & Password

Note: The 6-digit verification code may take a few minutes to arrive. If you don't see it in your inbox, please check your spam or junk folder before requesting a new code.

3

Enter your 6-digit code and click **“Verify Code”** To send a new code, click **“Send New Code”**

The screenshot shows the 'User Details' section of the portal. On the left, there is a welcome message with the County of Marin logo. The main form area is titled 'User Details' and contains the following elements:

- A green message box: "Verification code has been sent to your inbox. Please copy it to the input box below."
- An 'Email Address' field containing "chris.miranda@marincounty.gov".
- A 'Verification Code' field containing "872180".
- A blue button labeled "Verify code" with an orange circle highlighting it.
- A white button labeled "Send new code".
- At the bottom, there are links for "Data Privacy" and "Technical Support".

4

Create a password between 12 and 64 characters, enter your name, and click **“Create”**

The screenshot shows the 'Create' step of the portal. On the left, there is a welcome message with the County of Marin logo. The main form area contains the following elements:

- An 'Email Address' field containing "chris.miranda@marincounty.gov".
- A "Change e-mail" button.
- A 'New Password' field with a red error message: "The password must be between 12 and 64 characters." Below it is a password input field with masked characters.
- A 'Confirm New Password' field with a label "Confirm New Password" and an orange circle highlighting it.
- A 'Given Name' field with a label "Given Name".
- A 'Surname' field with a label "Surname".
- A blue button labeled "Create" with an orange circle highlighting it.

New User - Verification Code & Password

Note: The 6-digit verification code may take a few minutes to arrive. If you don't see it in your inbox, please check your spam or junk folder before requesting a new code.

3

Enter your 6-digit code and click **“Verify Code”** To send a new code, click **“Send New Code”**

The screenshot shows the 'User Details' section of the portal. On the left, there is a welcome message with the County of Marin logo. The main form area contains the following elements:

- User Details** header.
- A message box: "Verification code has been sent to your inbox. Please copy it to the input box below."
- Email Address** field: "chris.miranda@marincounty.gov"
- Verification Code** field: "872180"
- Verify code** button (highlighted with an orange circle).
- Send new code** button.
- Footer links for **Data Privacy** and **Technical Support**.

4

Create a password between 12 and 64 characters, enter your name, and click **“Create”**


The screenshot shows the 'Create' step of the portal. On the left, there is a welcome message with the County of Marin logo. The main form area contains the following elements:

- Email Address** field: "chris.miranda@marincounty.gov"
- Change e-mail** button.
- New Password** section with a red error message: "The password must be between 12 and 64 characters."
- New Password** field: "*****"
- Confirm New Password** field: "Confirm New Password" (highlighted with an orange circle).
- Given Name** field: "Given Name"
- Surname** field: "Surname"
- Create** button (highlighted with an orange circle).

5

Application Dashboard

This is your personalized dashboard where you can manage active **Tasks**, **Continue an Existing Application**, **Manage grants/ loans**, or **start a New Application**.



Welcome to the County of Marin Neighborly Portal.

The County of Marin is committed to accessibility for all applicants. If you require this material in an alternate format or have questions about the program, please contact us at (415) 473-6400.

My Tasks

Show Item Type: Active (1)

Task ID	Case	Subject	Status	Due Date	Action
16	30085: test	NEPA Check List 2	Active	10/31/2025	View Task

Continue an Existing Application

Case ID	Name	Program	Year	Status	Expires	Action
30058	Abode - 519 4th Street Community Apartments	Local Housing Trust Fund	2025	Application Under Review	N/A	View Application
30071	NBLY TEST	Public Services & Capital Improvements	2025	Application In Progress	2/8/2026	View Application
30089	test	Local Housing Trust Fund	2025	Application In Progress	N/A	View Application
30090	County Of Marin - Civic Center Project	Local Housing Trust Fund	2025	Application Submitted	N/A	View Application

Grants

ID	Name	Program	Year	Approved	Disbursed	Remaining	Action
30059	Artworks Downtown	Affordable Housing	2024	\$0.00	\$0.00	\$332,195.00	View
30085	test	Public Services & Capital Improvements	2025	\$0.00	\$0.00	\$10.00	View

Start a New Application

Search Applications

Application Name	Description	Action
Local Housing Trust Fund	This application is for affordable housing developers in Marin County, seeking funding through the Marin County Affordable Housing Fund/Measure W. The Housing Fund serves as a local resource, offering financial and technical assistance to support nonprofit affordable housing developers and local public agencies in creating and preserving affordable housing for low-income households. Applications are accepted on a rolling basis.	Start Application

Account Overview - Start

This is your personalized dashboard where you can manage active **Tasks**, **Continue an Existing Application**, **Manage grants/ loans**, or **start a New Application**.

1

When you sign in, you will be directed to your personalized application dashboard.

Dashboard

Good Afternoon, Chris

Welcome to the County of Marin Neighborhoodly Portal.

The County of Marin is committed to accessibility for all applicants. If you require this material in an alternate format or have questions about the program, please contact us at (415) 473-6400.

My Tasks Show Item Type: Active (1)

Task ID	Case	Subject	Status	Due Date	Action
15	30085-test	NEPA Review - Test Home Rehab - 123 Test Dr	Active	10/31/2025	View Task

Continue an Existing Application

Case ID	Name	Program	Year	Status	Expires	Action
30058	Abode - 519 4th Street Community Apartments	Local Housing Trust Fund	2025	Application Under Review	N/A	View Application

2

On your Dashboard, scroll down to the Grants section and click **"View"** to open an active grant.

30071	NBLY TEST	Improvements	2025	Progress	2/8/2026	Application
30089	test	Local Housing Trust Fund	2025	Application in Progress	N/A	View Application
30090	County Of Marin - Civic Center Project	Local Housing Trust Fund	2025	Application Submitted	N/A	View Application

Grants

ID	Name	Program	Year	Approved	Disbursed	Remaining	Action
30059	Artworks Downtown	Affordable Housing	2024	\$0.00	\$0.00	\$332,195.00	View
30085	test	Public Services & Capital Improvements	2025	\$0.00	\$0.00	\$10.00	View

Start a New Application Search Applications

Application Name	Description	Action
Local Housing Trust Fund	This application is for affordable housing developers in Marin County, seeking funding through the Marin County Affordable Housing Fund/Measure W. The Housing Fund serves as a local resource, offering financial and technical assistance to support nonprofit affordable housing developers and local public agencies in	Start Application

7

Account Overview

The **Account Overview** summarizes your grant's status, funding, and expenditures, providing a clear snapshot of your project's financial progress.

3

You'll be directed to the Account Overview page to view your program status, funding summary, and budget details.

The screenshot shows the 'Account Overview' page. On the left is a navigation sidebar with icons for Dashboard, Account, Application, Draw Requests, Reports, Accomplishments, Documents, Users, Tasks, and Print. The main content area displays the following information:

- Program:** Public Services & Capital Improvements
- Status:** Approved by HUD
- Amount Funded:** \$10
- Remaining:** \$10
- Disbursed:** \$0

Below this is a table titled 'Budget Categories':

ID	Category	Funding	Amount	Disbursed	Remaining
45	Housing Support Services	CDBG 2025/26	\$10	\$0	\$10

4

Click "**Print Budget**" in the upper right corner of the Account Overview page to print your Budget details.

This screenshot is identical to the previous one, but with the 'Print Budget' button in the top right corner highlighted with an orange circle. The button contains a printer icon and the text 'Print Budget'.

Account Overview - Budget Statement

The **Budget Statement** provides a detailed record of your award amount, funds spent, and remaining balance, serving as an official summary of your grant's financial activity.

5

The **Budget Statement** shows a breakdown of your grant funding, including the funding source, category, amount awarded, expenditures, and remaining balance. It serves as a complete financial record that can be printed or shared with County staff for verification or Certification.

Statement

Case Id: 30085
 Name: test
 Address: 123 Test Dr
 San Rafael, CA 94901

Funding Source: All

Date	Funding Source	Type	Category	Amount
10/6/2025	CDBG 2025/26	Initial Funding	Housing Support Services	\$10.00
Escrowed Deposited Amount				\$10.00

Date	Funding Source	Type	Category / Payee	Amount
Expensed Amount				\$0.00
Remaining Balance				\$10.00

This statement is accepted as a complete and final accounting for the escrow account funds.

Funding Source	Remaining Balance
CDBG 2025/26	\$10.00
Total Balance	\$10.00

 Staff Certification

 Date

 Mailed to Borrower

 Copy to Program file

— Draw Request Overview

This guide provides step-by-step instructions for submitting draw requests and reimbursement invoices through the County of Marin's Neighborly Software online grants portal. It outlines the full process from preparing your reimbursement materials to submitting your request and tracking its review status.

If you are submitting a reimbursement or draw request for the first time, this guide will show you how to:

- **Prepare** and **upload** your reimbursement letter and documentation
- **Enter** and **submit** a draw request in Neighborly
- Ensure required **reports** are on file for review
- **Track** your request status and respond to County comments

Before submitting your draw request, make sure to:

- Confirm each expense is eligible and charged to the correct budget category.
- Verify that the Requested Amount equals the total of uploaded invoices by category.
- Gather all required documentation (PDFs preferred):
 1. **Vendor invoice(s):** dated, itemized, and includes a unique invoice number
 2. **Proof of payment:** ACH confirmation, canceled check, or payroll register (if required)
 3. **Timesheets or labor logs:** include cost allocation details if requesting staff time
 4. **Contract or purchase order:** include any approved change orders, if applicable
 5. **Draw cover sheet or summary:** optional but recommended for clarity

— Draw Request

The Draw Request section allows you to submit reimbursements, track expenses, and upload documentation for payment through the County's grants portal.

1

From the left-hand menu, Click **"Draw Requests."** This will take you to the Summary page, where you can view previous draw requests and their status.

ID	Status	Workflow	Detail	Requested Date	Requested Amount	Disburs
25	Not Submitted	0 of 2	test	10/27/2025	\$0	N/A
24	Submitted	0 of 2	Test	10/21/2025	\$0.01	N/A

2

Click **"Add a Draw"** at the bottom of the page to begin a new draw request and invoice reimbursement.

Workflow	Detail	Requested Date	Requested Amount	Disbursed Date	Disbursed Amount	
0 of 2	test	10/27/2025	\$0	N/A	\$0	View
0 of 2	Test	10/21/2025	\$0.01	N/A	\$0	View

[Add a Draw](#)

— Draw Request - Description and Upload

The **Description** and **Upload** section allows you to describe your reimbursement request and upload supporting documents such as invoices, proof of payment, and reports required for County review.

3

In the Add a Draw pop-up window, enter the Request Date and a short Description of the draw, then click **“Add”**

ID	Status	Workflow	Detail	Requested Date	Requested Amount	Disbursed Date	Disbursed Amount
25	Not Submitted	0 of 2	test	10/27/2025	\$0	N/A	\$0
24	Submitted	0 of 2	Test	10/21/2025	\$0.01	N/A	\$0

4

On the new draw request page, you can upload supporting documentation by clicking **“Upload File.”**

	Original Amount	Other Disbursements	Available Balance	Amount Requested	Amount Approved
Support Services	\$10	\$0	\$10	\$ 0.00	\$0

— Draw Request - Submission

Before submitting, enter the **Reimbursement Amount** for each budget category and confirm that totals match your uploaded invoices and supporting documentation.

5

Enter the **Amount Requested** in the corresponding funding category under Details.

The screenshot shows a web interface for submitting a draw request. At the top, there is a section for 'Upload File (Optional)' with a table for file management and an 'Upload file' button. Below this is a table with columns: 'Original Amount', 'Other Disbursements', 'Available Balance', 'Amount Requested', and 'Amount Approved'. The first row is for 'Sport Services' with values \$10, \$0, \$10, and \$0. The 'Amount Requested' field for this row is highlighted with an orange circle and contains '\$ 0.00'. At the bottom, there are 'Cancel' and 'Submit' buttons.

	Original Amount	Other Disbursements	Available Balance	Amount Requested	Amount Approved
Sport Services	\$10	\$0	\$10	\$ 0.00	\$0
	\$10	\$0	\$10	\$0	\$0

6

After entering your request and uploading files, click **“Submit”** to send your draw request for review.

The screenshot shows the same web interface as in step 5, but now the 'Submit' button at the bottom is highlighted with an orange circle. The table below the 'Details' section shows the same data as in step 5, with the 'Amount Requested' field for 'Housing Support Services' containing '\$ 0.00'. The 'Cancel' and 'Submit' buttons are at the bottom.

Details				
Category	Original Amount	Other Disbursements	Available Balance	Amount Requested
Housing Support Services	\$10	\$0	\$10	\$ 0.00
Total	\$10	\$0	\$10	\$0

— Draw Request - Overview and Print Budgets

The **Overview** and **Print Budget** section summarizes your grant's funding and expenses and lets you **print** or **download** your budget statement for recordkeeping or County verification.

7

Once submitted, your uploaded files, along with the Status, requested and approved amounts, will appear in the draw Overview,

Documentation

Upload File (Optional)

File Name	Last Modified	Actions
code.png ()	chris.miranda@marincounty.gov 10/21/2025, 1:07:42 PM	Download

	Original Amount	Other Disbursements	Available Balance	Amount Requested	Amount Approved
Sport Services	\$10	\$0	\$10	\$0.01	\$0
	\$10	\$0	\$10	\$0.01	\$0

8

To print your draw request summary, click **“Print Draw Request”** in the upper right corner of the page.

ID: 28 [Print Draw Request](#)

Submitted: 10/27/2025
Group: Default

Amount Requested: \$0
Amount Approved: \$0

Information 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, then click Submit.

Documentation

Upload File (Optional)

File Name	Last Modified	Actions
-----------	---------------	---------

[Upload file](#)

— Reports Overview

The Reports section allows you to complete and submit required project reports, including accomplishments, beneficiary data, and supporting documentation. It ensures compliance with program requirements and provides County staff with updates on your project's progress and outcomes.

Reporting Requirements (All Grantees / “Subrecipients”)

Who must report: All grantees with fully signed grant contracts must submit regular reports. County staff may also request reports from projects with approved funding that are not yet under contract.

Reporting schedule (twice yearly):

- 1. Due by January 31 — covers July 1–December 31** (first half of the grant year)
- 2. Due by July 31 — covers July 1–June 30** (the full grant year)

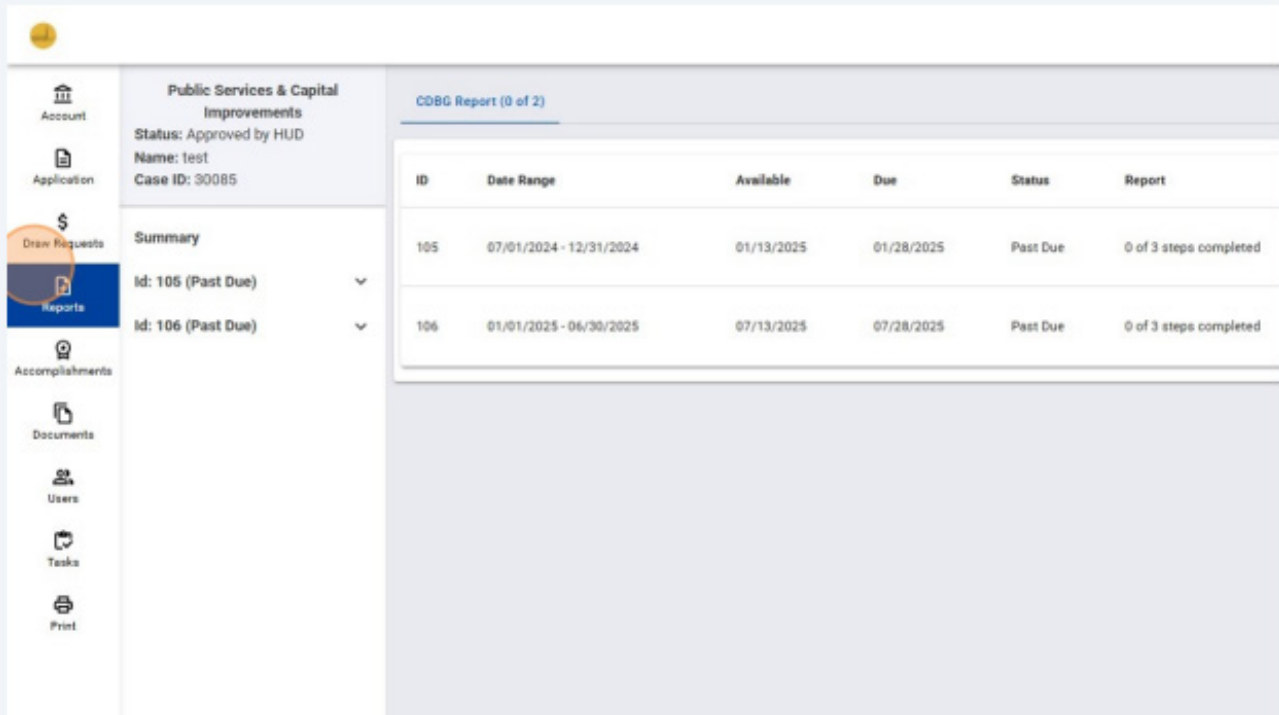
Duration: Continue reporting through the end of the fiscal year in which grant funds are fully expended, or as otherwise directed by County staff.

— Reports - Overview Page

The **Reports Overview** page provides access to all required reporting forms and submission deadlines, helping you track, complete, and submit reports for your funded project.

1

From the left-hand menu, click **“Reports”**. This page will display your reporting schedule, including report ID, date range, due date, and status.

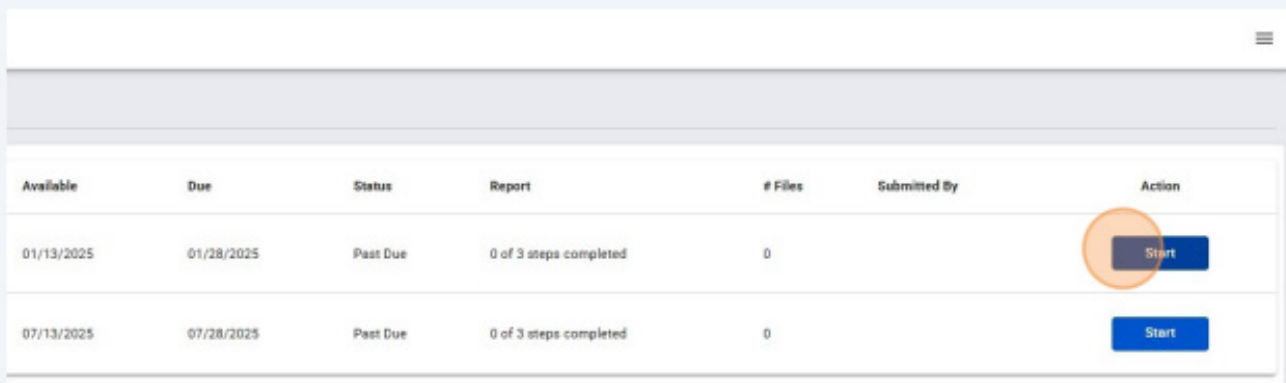


The screenshot shows the Reports Overview page. On the left is a sidebar menu with icons for Account, Application, Draw Requests, Reports (highlighted), Accomplishments, Documents, Users, Tasks, and Print. The main content area displays the account details for 'Public Services & Capital Improvements' and a table of reports.

ID	Date Range	Available	Due	Status	Report
105	07/01/2024 - 12/31/2024	01/13/2025	01/28/2025	Past Due	0 of 3 steps completed
106	01/01/2025 - 06/30/2025	07/13/2025	07/28/2025	Past Due	0 of 3 steps completed

2

Locate the report you wish to complete and click **“Start”** under the Action column to begin.



This close-up view of the reports table shows the 'Action' column. The 'Start' button for the first report (ID 105) is circled in orange, indicating where to click to begin the report.

Available	Due	Status	Report	# Files	Submitted By	Action
01/13/2025	01/28/2025	Past Due	0 of 3 steps completed	0		Start
07/13/2025	07/28/2025	Past Due	0 of 3 steps completed	0		Start

— Reports - Subrecipient Information

The **Subrecipient Information** section collects basic details about your organization and project, ensuring County records are accurate for reporting and compliance.

3

Enter your **organization** and **project details**, and Ensure all fields are filled accurately before continuing.

The screenshot shows a web interface for a 'CDBG Report (1 of 2)'. The main heading is 'Subrecipient Information'. Below the heading, it says 'Please provide the following information.' The form contains the following fields:

- 1. Organization Name (text input)
- 2. Contact First Name (text input)
- 3. Contact Last Name (text input)
- 4. Contact Email (text input)
- 5. Project Name (text input)
- 6. Project Address (text input, labeled 'Address Line 1')

On the left side, there is a sidebar with a menu. The 'Subrecipient Information' item is highlighted. At the top left of the sidebar, it says 'Services & Capital Improvements Approved by HUD' and 'JOB5'. At the bottom left, there is a 'Back to Dashboard' link.

4

If applicable, attach any supporting documents, such as invoices, receipts, photos, or case studies. Once complete, click **“Complete & Continue”**

The screenshot shows the 'Attachments' section of the report. It features a list of checkboxes for various types of supporting documents:

- Public meetings held
- Outreach efforts documented
- Attachments (if applicable):
 - Invoices/Receipts
 - Photos
 - Case Studies
 - Beneficiary Testimonials

Below the list, there is a 'Documentation' section with a radio button for 'Additional Supporting Documentation (Optional)'. At the bottom, there are two buttons: 'Save' and 'Complete & Continue'. The 'Complete & Continue' button is highlighted with an orange circle. A 'No save history' message is also visible.

— Reports - Accomplishments

The **Accomplishments** section records the number of beneficiaries served and key demographic data, demonstrating your project's impact and compliance with program requirements.

5

In the **Accomplishments**, report beneficiary totals and demographic data, ensuring consistency across all tables.

The screenshot shows the 'Accomplishments' section of a CDBG Report. On the left, a sidebar contains project details: 'Public Services & Capital Improvements', 'Status: Approved by HUD', 'Name: test', 'Case ID: 30085', and a list of projects including 'E 105 (In Progress)' and 'E 106 (Past Due)'. The 'Accomplishments' section is selected. The main content area is titled 'Accomplishments' and includes instructions: 'To report demographic information, please include both 1) the number of people your organization serves in total, and 2) the number of people being served by your project/organization, these numbers may be different.' It also states: 'The numbers you report must reflect the people served during the cumulative grant year, to date. Please refer to the Reporting Period you selected above.' A note specifies: 'The "Total" column must include the number of Hispanic/Latino beneficiaries as part of the sum. Due to federal reporting requirements, we ask that you report Hispanic/Latino beneficiaries in its stand-alone column.' A red 'Please Note' states: 'The total number of CDBG Beneficiaries must match in all three tables: Demographic Information, Income Level, and Project Impact (or Expected Impact)'. Below this, a table titled 'Race (Organization)' has four rows with input fields: 'White', 'Black/African American', 'Asian', and 'American Indian/Alaskan Native'.

6

Once complete, click **“Complete & Continue”** to be directed to the submissions page.

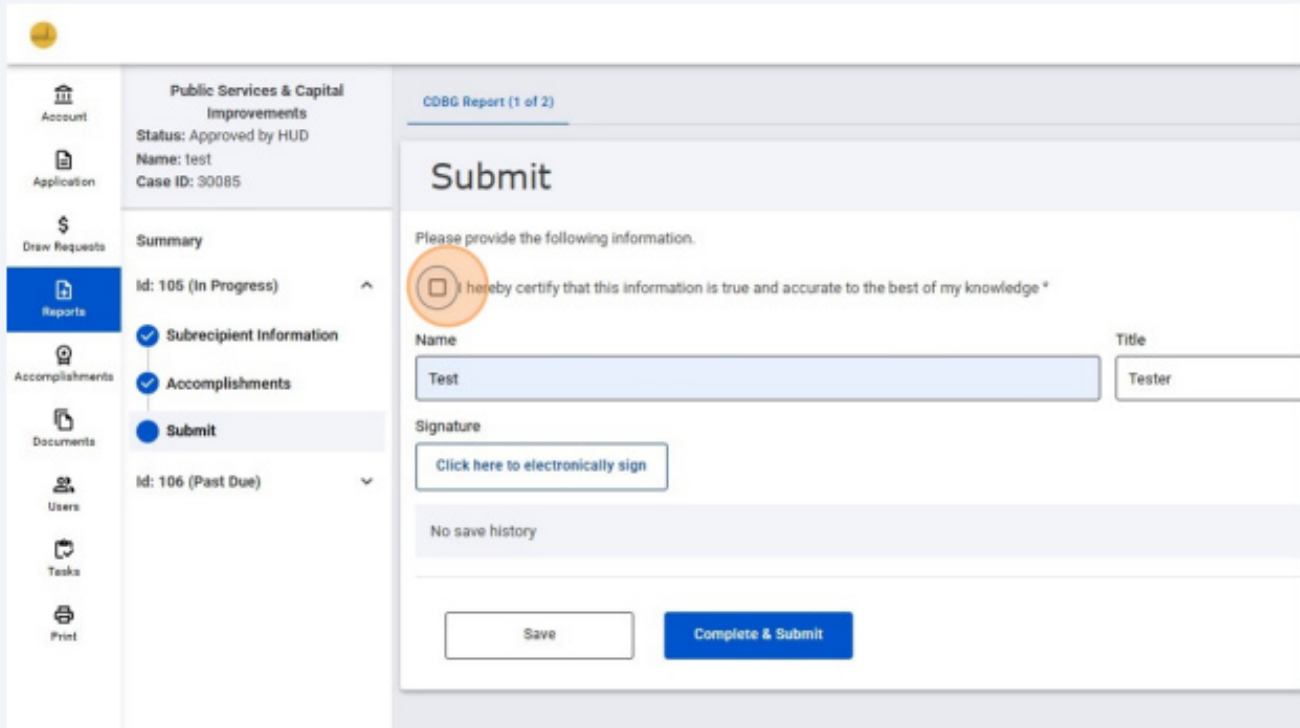
The screenshot shows the 'Project Impact (or Expected Impact)' section of the reporting form. The sidebar on the left is similar to the previous screenshot, with 'E 106 (Past Due)' selected. The main content area is titled 'Project Impact (or Expected Impact)' and contains three rows of input fields: 'Total persons assisted with new or continuing access to a service or benefit', 'Total persons assisted with improved access to a service or benefit', and 'Total persons assisted receiving a service or benefit that is no longer substandard'. A 'Totals: 0' label is positioned at the bottom right of the input area. Below the input fields, there is a 'No save history' message. At the bottom of the form, there are two buttons: 'Save' and 'Complete & Continue', with the latter button circled in orange.

— Reports - Review and Certify

The **Review and Certify** section allows you to review all entered data, verify its accuracy, and certify that the information provided is true and complete.

7

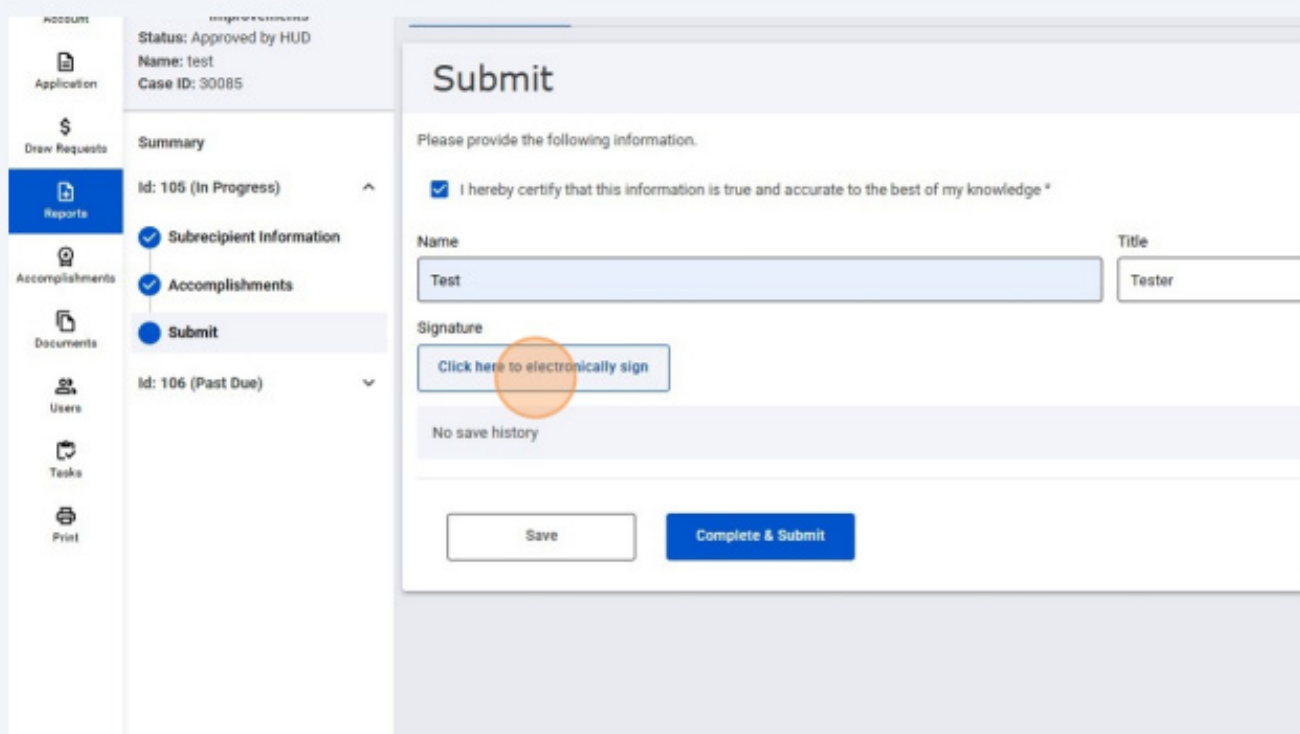
Review all information for accuracy. Check the box to **certify** that the data is true and correct to the best of your knowledge.



The screenshot shows a web interface for submitting a report. On the left is a navigation sidebar with icons for Account, Application, Draw Requests, Reports, Accomplishments, Documents, Users, Tasks, and Print. The main content area is titled 'Public Services & Capital Improvements' and shows 'Status: Approved by HUD', 'Name: test', and 'Case ID: 30085'. Below this is a 'Summary' section with a list of items: 'Id: 105 (In Progress)', 'Subrecipient Information', 'Accomplishments', and 'Submit'. The 'Submit' item is selected. The main form area is titled 'Submit' and contains the text 'Please provide the following information.' followed by a checkbox labeled 'I hereby certify that this information is true and accurate to the best of my knowledge *'. The checkbox is highlighted with an orange circle. Below the checkbox are input fields for 'Name' (containing 'Test') and 'Title' (containing 'Tester'). There is also a 'Signature' section with a button labeled 'Click here to electronically sign'. At the bottom of the form are two buttons: 'Save' and 'Complete & Submit'.

8

Enter your name and title, then click “**Click here to electronically sign**” to apply your signature and authorize submission.



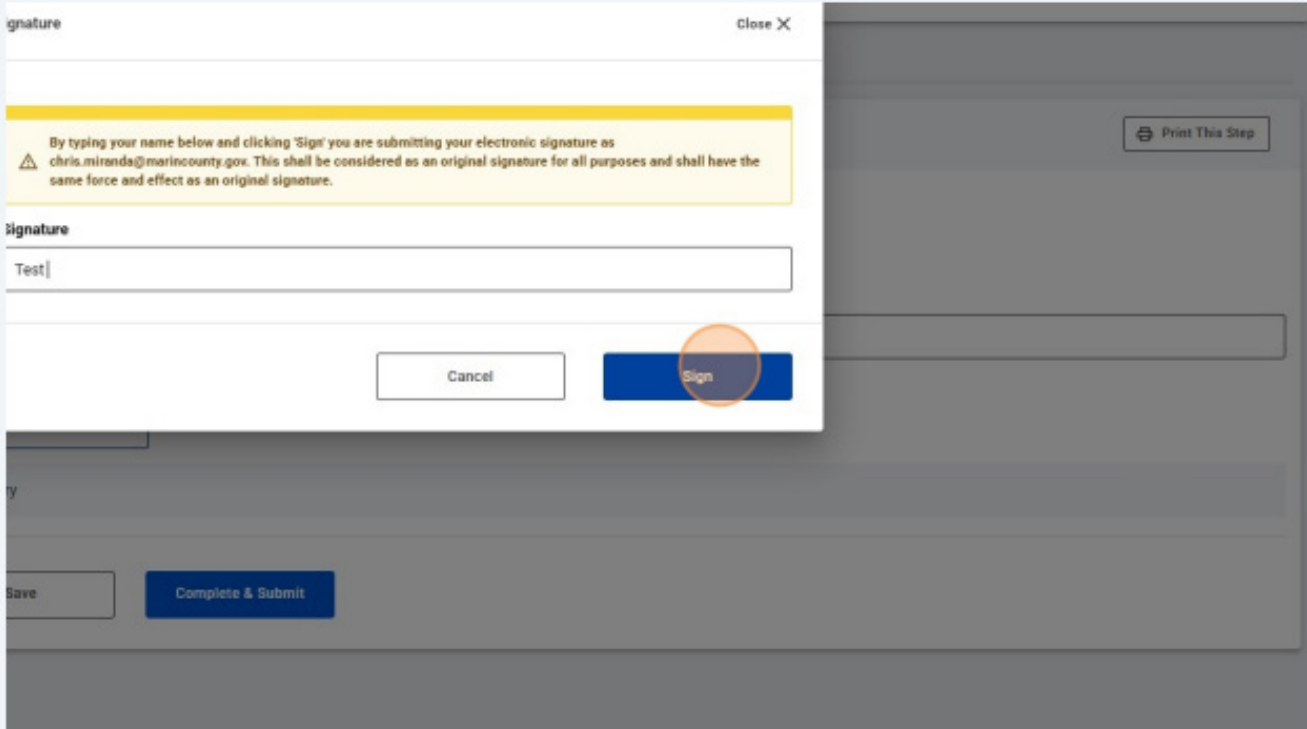
This screenshot is identical to the one above, but the 'Click here to electronically sign' button in the Signature section is highlighted with an orange circle. The certification checkbox is now checked.

— Reports - Signature and Submission

The **Signature and Submission** section is where you electronically sign and submit your report, finalizing your submission for County review and approval.

9

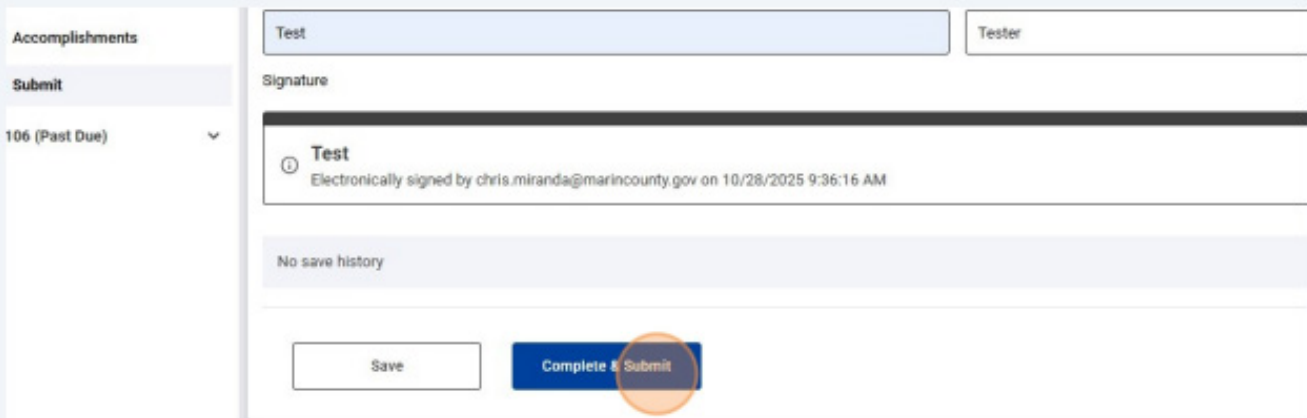
A pop-up box will appear. Enter your name again and click **“Sign”**. Your name and date will display as the official electronic signature.



The screenshot shows a white pop-up window titled "Signature" with a "Close X" button in the top right corner. Inside the window, there is a yellow warning box with a triangle icon and the text: "By typing your name below and clicking 'Sign' you are submitting your electronic signature as chris.miranda@marincounty.gov. This shall be considered as an original signature for all purposes and shall have the same force and effect as an original signature." Below this is a text input field labeled "Signature" containing the text "Test". At the bottom of the pop-up are two buttons: "Cancel" and "Sign". The "Sign" button is highlighted with an orange circle. In the background, a greyed-out form is visible with a "Print This Step" button and a "Complete & Submit" button.

10

Once signed, click **“Complete & Submit”** to finalize your report. Your submission will automatically route to County staff for review.



The screenshot shows a web interface for report submission. On the left is a sidebar with "Accomplishments" and "Submit" sections. The "Submit" section shows "106 (Past Due)" with a dropdown arrow. At the bottom of the sidebar is a "Back to Dashboard" link. The main content area has a "Test" input field and a "Tester" input field. Below these is a "Signature" section with a large text area containing "Test" and "Electronically signed by chris.miranda@marincounty.gov on 10/28/2025 9:36:16 AM". Below the signature area is a "No save history" message. At the bottom are "Save" and "Complete & Submit" buttons. The "Complete & Submit" button is highlighted with an orange circle.

Accomplishments

Note Read-Only Data: This page is read-only. To make corrections, return to Reports and edit the corresponding report, then refresh this view



- 1. Open Accomplishments:** In the left menu, click Accomplishments to view your project's reported outcomes.
- 2. Review Summary:** Confirm the Program, Status, and Case ID at the top. Scan the tables for totals by date range and overall totals (e.g., race, ethnicity).
- 3. Print/Save:** Click Print Accomplishments in the upper right corner to generate a printable copy for your records.

Account

Application

Draw Requests

Reports

Accomplishments

Documents

Users

Tasks

Print

Accomplishments

[Print Accomplishments](#)

Program: Public Services & Capital Improvements
Status: Approved by HUD

Name: test
Case Id: 30085

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

Race (Organization)	7/1/2024 - 12/31/2024	1/1/2025 - 6/30/2025	Total
White	0	0	0
Black/African American	0	0	0
Asian	0	0	0
American Indian/Alaskan Native	0	0	0
Native Hawaiian/Other Pacific Islander	0	0	0
American Indian/Alaskan Native & White	0	0	0
Asian & White	0	0	0
Black/African American & White	0	0	0
Other Multi-Racial	0	0	0
Other/Not Disclosed	0	0	0
Total	0	0	0

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

Ethnicity (Organization)	7/1/2024 - 12/31/2024	1/1/2025 - 6/30/2025	Total
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Documents

The Documents section stores all **project files** uploaded to your Neighborly account, including **Grant agreements, Contracts, invoices, reports, and compliance materials**. Use this section to upload new documents or access, view, and download existing files for your records.



- 1. Open Documents:** In the left menu, click Documents to view all files uploaded for your project.
- 2. Upload a File:** Select the appropriate File Upload Type from the dropdown menu, then click Upload file to add new documents.
- 3. View or Download:** Use View to open a file in your browser or Download to save a copy for your records.

File Name	File Type	Last Modified
CDBG Invoice example.pdf (16 kb) Download View	Invoices/Receipts	chris.miranda@marincounty.gov 10/6/2025, 2:50:57 PM
Davis Bacon Compliance Steps for webpage 7.2023.pdf (205 kb) Download View	Davis-Bacon Compliance	chris.miranda@marincounty.gov 10/6/2025, 2:51:35 PM
HUD Sample-FONSI-and-RROF.docx (25 kb) Download View	Environmental Review	chris.miranda@marincounty.gov 10/6/2025, 2:52:35 PM
CDBG Capital and Housing Template.docx (313 kb) Download View	Conditional Approval	chris.miranda@marincounty.gov 10/6/2025, 2:53:10 PM
HOME Template.docx (313 kb) Download View	Additional Supporting Documentation	chris.miranda@marincounty.gov 10/6/2025, 2:57:47 PM

Note: Only users added to your organization's account will have access to view and manage your project in the Neighborly portal. Additional staff can be added to view project information, complete reports, upload or view documents, submit Draws, and manage assigned tasks.



- 1. Open Users:** In the left menu, click Users to view who has access to your organization's application and project information.
- 2. Add a User:** Click Add User and enter the email address of the individual you'd like to grant access.

The screenshot displays the 'Users' management interface. On the left is a navigation menu with icons for Account, Application, Draw Requests, Reports, Accomplishments, Documents, Users (highlighted), Tasks, and Print. The main content area is titled 'Users' and includes a note: 'Email addresses added below will have access to view information in your application and make changes.' Below this note is a table with the following data:

Users
chris.miranda@marincounty.gov
tammy.taylor@marincounty.gov

A blue 'Add User' button is located below the table. A callout box contains the following text:

Review your organization's current user list regularly to ensure the correct team members have access. For example, confirm that **Program Managers** can submit reports, **Accounting staff** can submit draw requests and invoices, and **Executive staff** such as your **CEO or Program Director** can view contracts, grant or loan agreements, and budgets.

— Task Overview

The Tasks page lists all assigned actions or requests that require your attention, such as document uploads, missing document requests, clarification requests, NEPA reviews, reports, or other grant-related items. Each task includes a subject line, due date, and detailed instructions from Marin County staff.

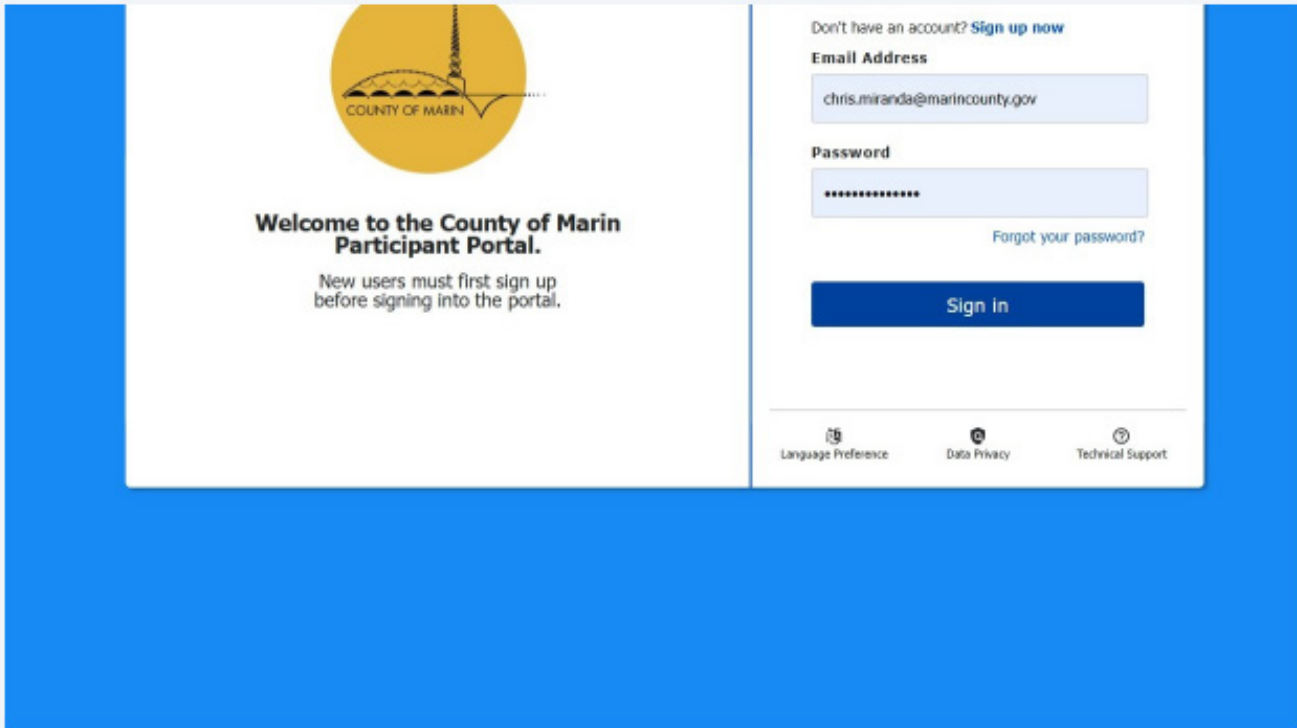
Each task identifies the Owner(s) responsible for completion and Followers who receive updates. Use the Messages tab to communicate directly with County staff, ask questions, or provide clarifications.

Once all required documents and actions are complete, click Complete & Submit to update the task status. Files uploaded here are visible to both your organization and the County. Completed tasks automatically move from Active to Closed, helping track project progress and maintain compliance.

Tasks - Sign & View My Tasks

The **Sign & View My Tasks** section walks you through how to access your assigned tasks, review details, and open items that require action or document uploads.

1 Sign in

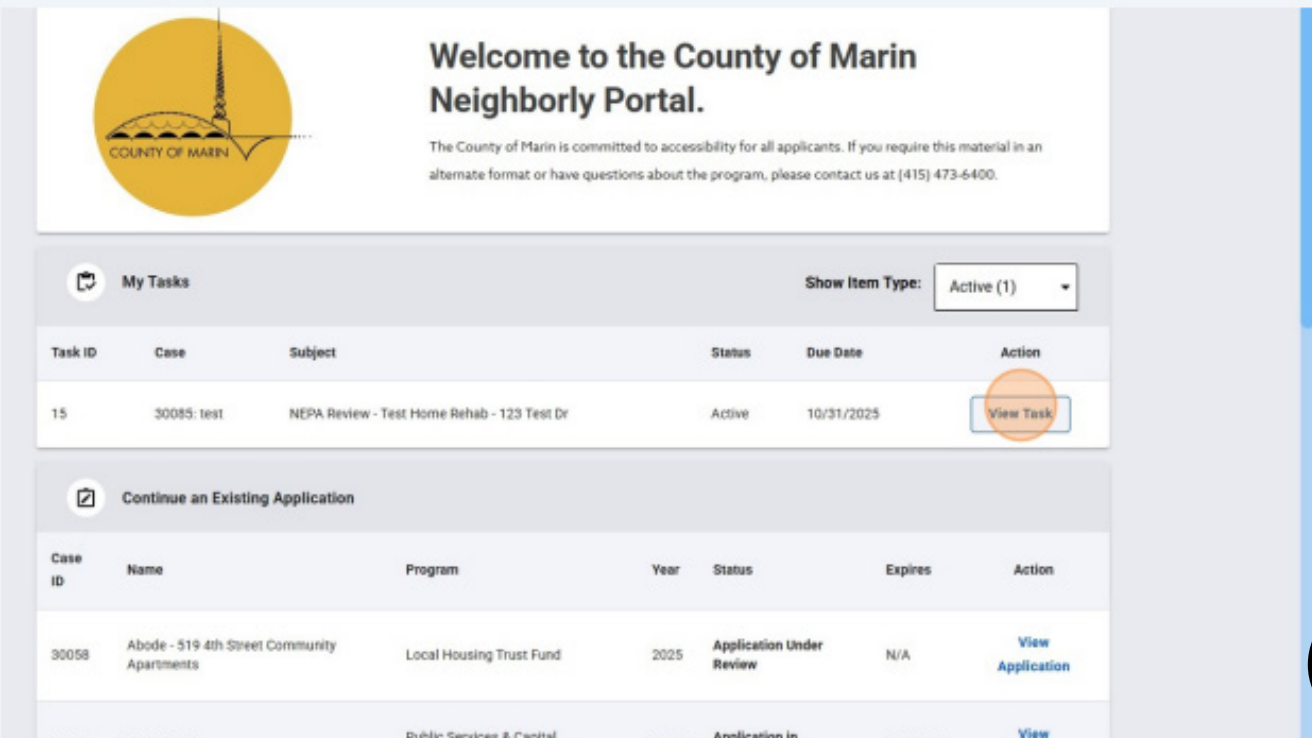


The screenshot shows the 'Welcome to the County of Marin Participant Portal' page. On the left, there is a logo for the County of Marin and a welcome message: 'Welcome to the County of Marin Participant Portal. New users must first sign up before signing into the portal.' On the right, there is a sign-in form with the following fields and options:

- Don't have an account? [Sign up now](#)
- Email Address:
- Password:
- [Forgot your password?](#)
-

At the bottom of the form, there are three links: [Language Preference](#), [Data Privacy](#), and [Technical Support](#).

2 Click “View Task” to open and review details or upload documents.



The screenshot shows the 'Welcome to the County of Marin Neighborly Portal' page. The main heading is 'Welcome to the County of Marin Neighborly Portal.' Below the heading, there is a message: 'The County of Marin is committed to accessibility for all applicants. If you require this material in an alternate format or have questions about the program, please contact us at (415) 473-6400.'

Below the message, there is a section titled 'My Tasks' with a 'Show Item Type:' dropdown menu set to 'Active (1)'. The table below shows a single task:

Task ID	Case	Subject	Status	Due Date	Action
15	30085: test	NEPA Review - Test Home Rehab - 123 Test Dr	Active	10/31/2025	View Task

Below the 'My Tasks' section, there is a section titled 'Continue an Existing Application' with a table showing existing applications:

Case ID	Name	Program	Year	Status	Expires	Action
30058	Abode - 519 4th Street Community Apartments	Local Housing Trust Fund	2025	Application Under Review	N/A	View Application
-----	-----	Public Services & Capital	-----	Application in	-----	View

Tasks - Overview Page

The **Overview page** summarizes all active and completed tasks, including deadlines, assigned staff, and County instructions.

3

Each task includes a Subject line, Details, Status, Due Date, and Attachment, Task Owners and Task Followers

The screenshot shows a web interface for task management. On the left is a navigation sidebar with icons for Account, Application, Draw Requests, Reports, Accomplishments, Documents, Users, Tasks (highlighted), and Print. The main content area is titled 'Tasks' and features a task card for 'NEPA Review - Test Home Rehab - 123 Test Dr'. The card includes a 'Details' tab and a 'Messages (1)' tab. The 'Subject' field is circled in orange. Below the subject is a 'Details' section with text: 'Please complete the NEPA review for (Test Home Rehab - 123 Test Dr) Grant # B-24-UC-06-0004 Review Level: CEST'. The 'Status' is 'Active' and the 'Due Date' is '10/31/2025'. To the right, there are sections for 'Owners' (tammy.taylor@marincounty.gov, chris.miranda@marincounty.gov) and 'Followers' (chris.miranda@marincounty.gov). At the bottom, an 'Attachments' table is partially visible with columns for File Name, Last Modified, and Actions.

4

"DETAILS" detailed instructions from Marin County staff.

This screenshot shows the 'Details' view of the same task. The 'Subject' field is circled in orange. The 'Details' section contains the text: 'Please complete the NEPA review for (Test Home Rehab - 123 Test Dr) Grant # B-24-UC-06-0004 Review Level: CEST'. The 'Status' is 'Active' and the 'Due Date' is '10/31/2025'. The 'Owners' and 'Followers' sections are identical to the overview page. The 'Attachments' table at the bottom shows a file named 'Site Contamination Field Inspection from v.6-18.docx (13 kb)' with a 'Last Modified' date of 'chris.miranda@marincounty.gov' and 'Actions' for 'Download' and 'Delete'.

Tasks - Documents & Attachments

The **Documents & Attachments** section walks you through how to upload or download files related to a specific task for County review.

5 Click **"Download"** to view any attached files.

Improvements
Status: Approved by HUD
Name: test
ID: 30085

Task ID: 15
Status: Active
Due: 10/31/2025

family home built in 1980
Attached, please find the NEPA check list, Photos and related documents.

Followers:
chris.miranda@marincounty.gov

Status: Active Due Date: 10/31/2025

Attachments

File Name	Last Modified	Actions
Site Contamination Field Inspection form v 6-18.docx (13 kb)	chris.miranda@marincounty.gov 10/20/2025, 12:53:04 PM	Download Delete
NEPA Checklist.pdf (200 kb)	chris.miranda@marincounty.gov 10/20/2025, 12:53:21 PM	Download Delete
NEPA Additional Documents_.pdf (594 kb)	chris.miranda@marincounty.gov 10/20/2025, 12:53:28 PM	Download Delete

[Upload file](#)

6 Click **"Upload File"** to add files related to the task.

Improvements
Status: Approved by HUD
Name: test
ID: 30085

Task ID: 15
Status: Active
Due: 10/31/2025

family home built in 1980
Attached, please find the NEPA check list, Photos and related documents.

Followers:
chris.miranda@marincounty.gov

Status: Active Due Date: 10/31/2025

Attachments

File Name	Last Modified	Actions
Site Contamination Field Inspection form v 6-18.docx (13 kb)	chris.miranda@marincounty.gov 10/20/2025, 12:53:04 PM	Download Delete
NEPA Checklist.pdf (200 kb)	chris.miranda@marincounty.gov 10/20/2025, 12:53:21 PM	Download Delete
NEPA Additional Documents_.pdf (594 kb)	chris.miranda@marincounty.gov 10/20/2025, 12:53:28 PM	Download Delete

[Upload file](#)

[Complete & Submit Task](#)

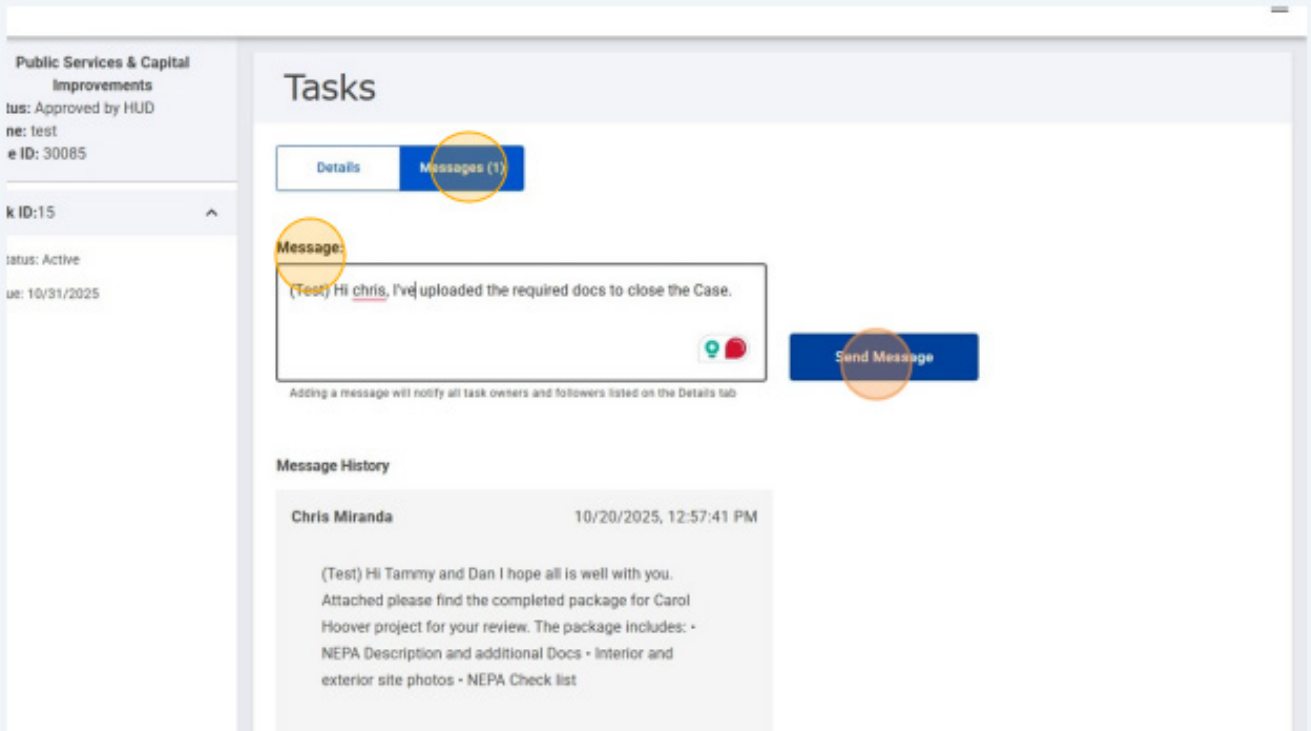
[Back to Dashboard](#)

Tasks - Review & Communicate

The **Review & Communicate** section walks you through how to send messages, share updates, and view communication history with County staff.

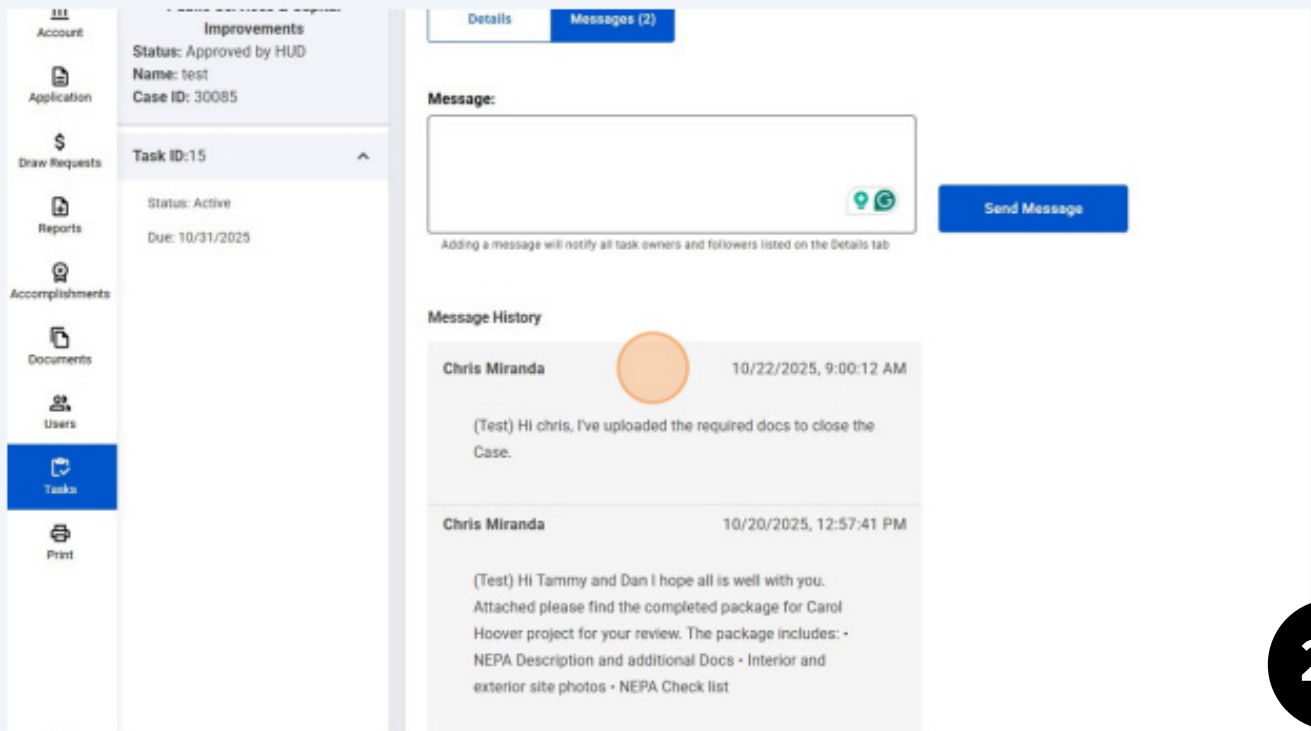
7

Click **“Messages”** to share progress updates, provide clarifications, or communicate with County staff regarding a task.



8

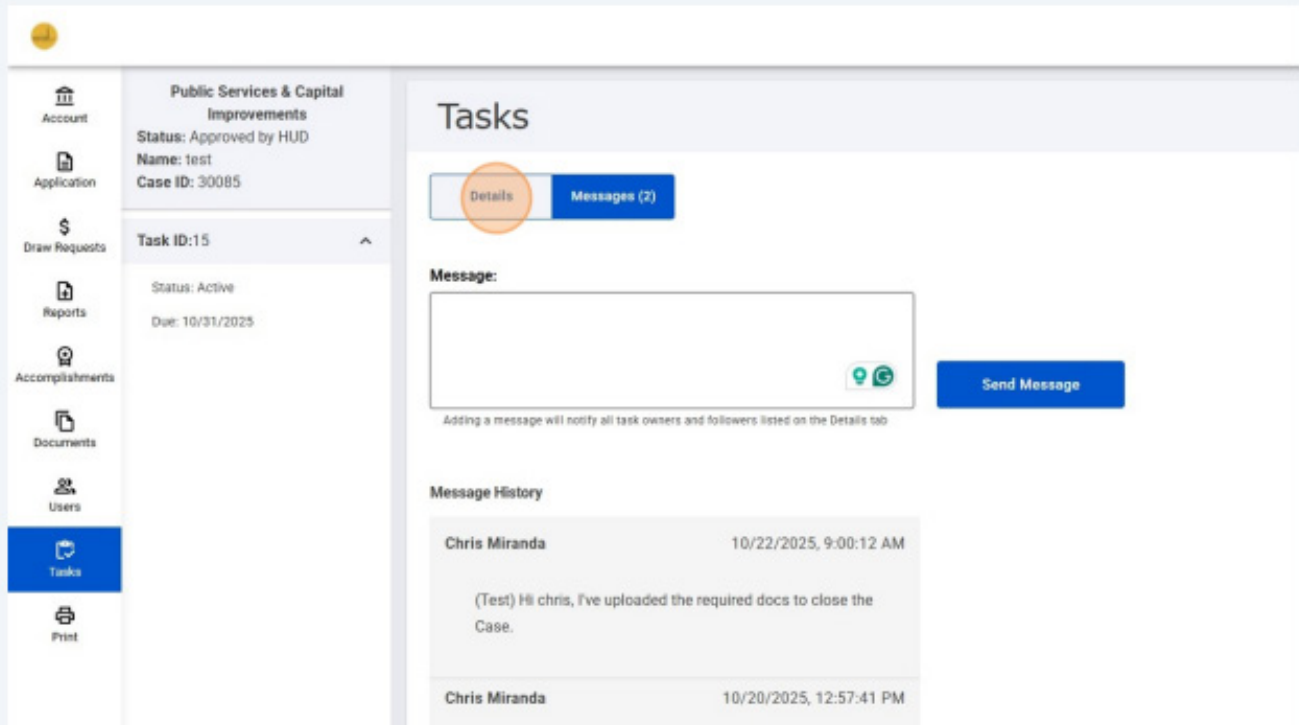
Scroll down to **“Message History”** to view messages, updates, and communication history with County staff within this section.



Tasks - Complete & Close a Task

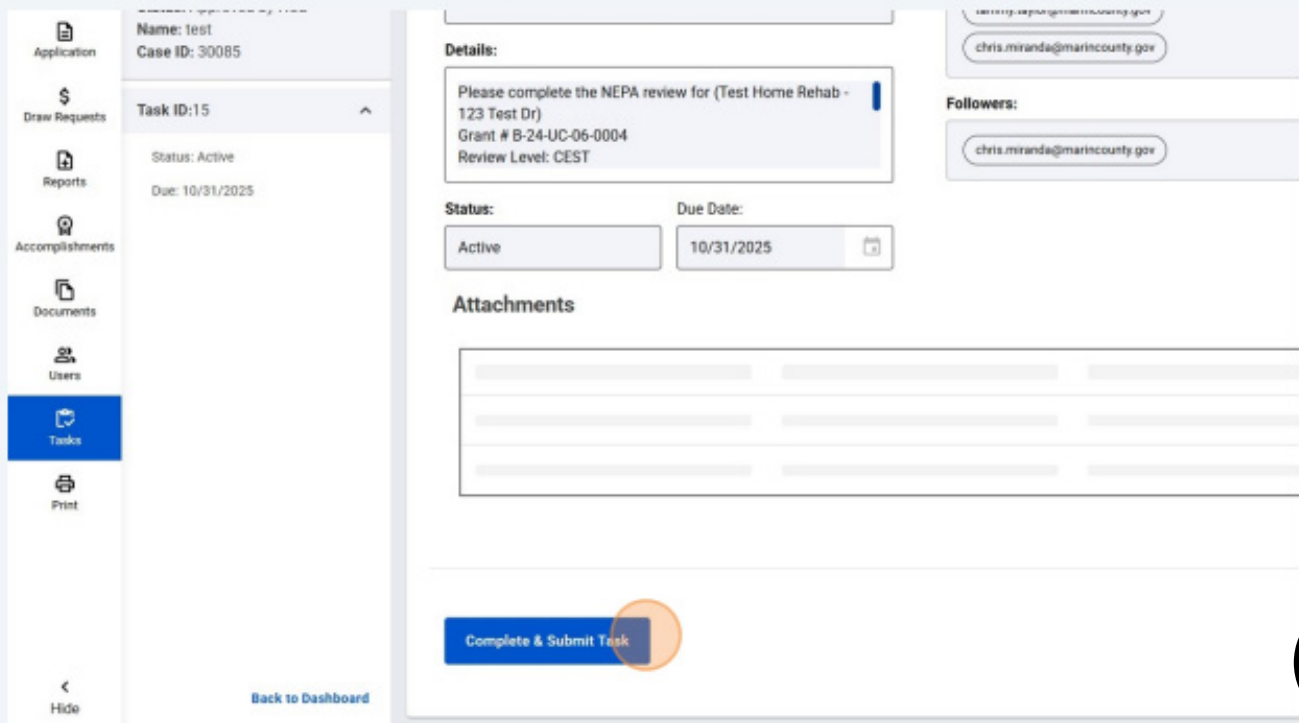
After reviewing all documents and uploading any required items, mark the task as Complete. County staff will close it once all requirements are met.

9 Click "**Details**" to return to the Task Details page.



The screenshot shows a web interface for task management. On the left is a sidebar with icons for Account, Application, Draw Requests, Reports, Accomplishments, Documents, Users, Tasks (highlighted in blue), and Print. The main content area is titled 'Tasks' and has two tabs: 'Details' (circled in orange) and 'Messages (2)'. Below the tabs, there is a 'Message:' section with a text input field and a 'Send Message' button. Below that is a 'Message History' section with two entries: one from Chris Miranda on 10/22/2025 at 9:00:12 AM with the message '(Test) Hi chris, I've uploaded the required docs to close the Case.', and another from Chris Miranda on 10/20/2025 at 12:57:41 PM. The top of the page shows 'Public Services & Capital Improvements' and 'Status: Approved by HUD'.

10 Once all required items are complete, click "**Complete & Submit**" to update the task status and send it for County review



The screenshot shows the 'Task Details' page. The sidebar is the same as in the previous screenshot. The main content area has a 'Details:' section with a text input field containing 'Please complete the NEPA review for (Test Home Rehab - 123 Test Dr) Grant # B-24-UC-06-0004 Review Level: CEST'. Below this is a 'Status:' dropdown menu set to 'Active' and a 'Due Date:' field set to '10/31/2025'. There is an 'Attachments' section with a table of empty rows. At the bottom, there is a 'Complete & Submit Task' button (circled in orange) and a 'Back to Dashboard' link. The top right of the page shows a user profile for 'chris.miranda@marincounty.gov' and a 'Followers:' section with the same email address listed.

The **Print** section allows you to generate and save a complete copy of your application or project records, including all sections and attachments, for your files or County verification.



- 1. Open Print:** From the left-hand menu, select Print to access printing options for your application or project records.
- 2. Choose Sections:** In the Print Application window, check the boxes next to the sections you want to include (e.g., Program Overview, Project Information, Required Documents).
- 3. Print or Save:** Click Print to generate a PDF version of your selected sections. You can print it directly or save it for your records and County verification.

Need Help?

If you need assistance using the Neighborly portal or have questions about your grant, draw request, or reporting requirements, County staff are here to help. Contact your County project representative for guidance or technical support.

Phone: (415) 473-6279

California Relay Service (CRS): Dial 711 for hearing or speech assistance.

Email: federalgrants@marincounty.gov

Address:

County of Marin – Community Development Agency
Housing & Federal Grants Division
3501 Civic Center Drive, Suite 308
San Rafael, CA 94903