



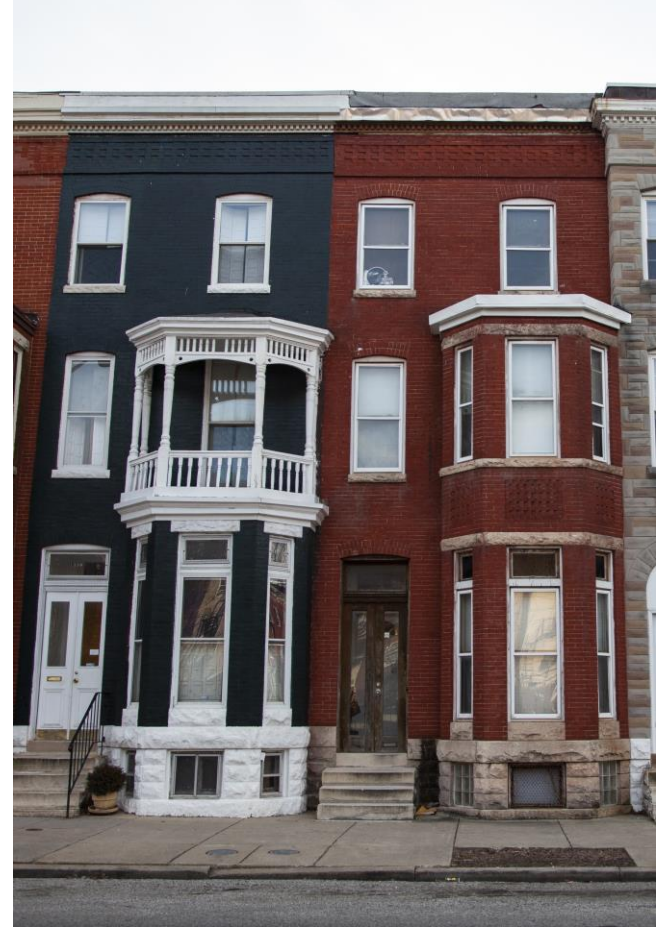
— BALTIMORE CITY —
**DEPARTMENT OF HOUSING &
COMMUNITY DEVELOPMENT**

CDBG Reporting Training

October 2024

OPENING COMMENTS

- Welcome
- CD50 & CD51 Updates
- Purpose:
 - 1.) Align subgrantees reporting and payments processes to improve fairness and efficiency.
 - 2.) Provide greater accountability / documentation via Neighborly for subgrantees and CDBG staff.
 - 3.) Align draw requests and corresponding accomplishments.



PRESENTATION AGENDA

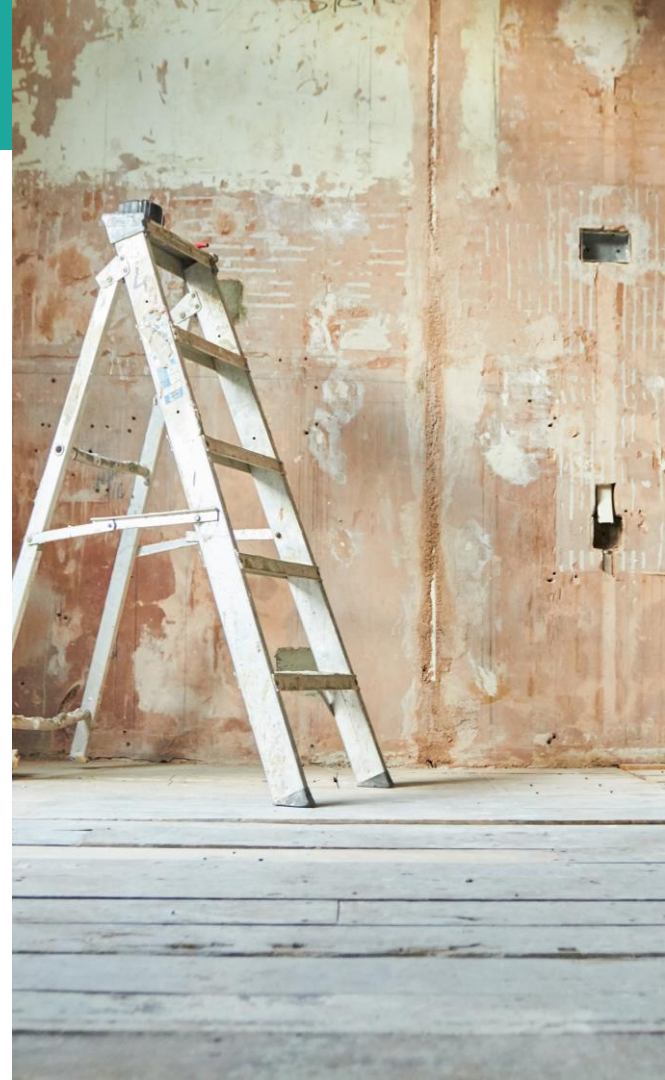
- Why do we collect CDBG Report data
- When do we collect data
- What data do we collect
- Draw requests in Neighborly
- Communication through Neighborly
- Questions

WHEN, WHY AND HOW DO WE COLLECT DATA?

- Quarterly – 15th day after the end of each quarter
- Annually – in July of each year for the CAPER
- All reports must be submitted via Neighborly
- Substantiates that work is complete and reimbursable
- HUD requires DHCD to report on each subrecipients' accomplishments

WHY DO WE COLLECT CDBG DATA?

- Data is entered into HUD's system of record (IDIS).
- Data is included in the Consolidated Annual Performance Evaluation Report (CAPER).
- Data is included in the DHCD Annual Report.
- The Communication Division may share the data with the media and researchers.
- Accurate and complete data is critical.



NEIGHBORLY - PART 1: GOALS

- Provide progress achieved in accomplishing goals / objectives
- Show actual outcome versus expected outcome
- Note any difficulties encountered
- Goals come from Section F: Activity Descriptions on your application

Always click save when you are ready to move on.

NEIGHBORLY - PART 2: ACCOMPLISHMENTS REPORTING

Beneficiaries Served

- Quarterly Target to be Served
- Number Actually Benefiting this Quarter
- Total Served to Date

Costs

- CDBG Costs as Authorized in your Contract
- Amounts from other funding sources
- CDBG Amount Expended
- Other Funding Expended

Always click save when you are ready to move on.

NEIGHBORLY - PART 3: NARRATIVE AND SUPPORTING DOCUMENTS

- Provide a narrative describing accomplishments and barriers during the quarter
- This can be done by listing Successes/Highlights for EACH activity and any challenges for EACH activity
- Upload any supporting documentation
- These could include progress reports or a list of projects completed

Always click save when you are ready to move on.

NEIGHBORLY - PART 4: REQUIRED DOCUMENTS

Upload the required electronic reports to the appropriate location in Neighborly

- Based on the Reporting section of your Contract
- Download and complete the appropriate forms and upload into Neighborly Part 4 in their original format. No PDF's
- Forms are located and downloadable in Neighborly – Part 4
- Do not submit reporting forms as an attachment to a Task or an email. Only submit forms to Neighborly Reports – Part 4.

Always click save when you are ready to move on.

REIMBURSEMENT REQUESTS - CHANGES IN CD-50

- ***NEW** - All subrecipients will only make draw requests quarterly through the Neighborly portal.
- ***NEW** - Draw Form / Reimbursement Request Excel template will only be found in the Documents, Subrecipient Contract Documents folder.
- ***NEW** - Reporting out of cycle, combining reporting periods or year end reporting will not be accepted and negatively impact the scoring of next years application.
- ***NEW** - Reporting reminders will be generated in Neighborly and sent as a Neighborly Notification email.

Special Note: Quarter 1 of CD-50 will have an extended deadline of October 31st

REIMBURSEMENT PROCESS

- Request payment via Neighborly : Budget > Draw Request tab.
 - Check the status of award in the Neighborly Budget.
 - Upload your documentation to support the charges in your request.
 - *NEW – Draw request in Neighborly are based on activities. Budgets are set up by activity.
 - Visual representation of funds disbursed and pending and remaining.
 - Cannot overspend.

ACCOMPLISHMENT REPORTING - 1

- Click on Reports section to open reporting module.

Home

ACCOUNT

REPORTS ****2 REPORTS DUE**

ACCOMPLISHMENTS

DRAW REQUESTS

APPLICATION

DOCUMENTS

USERS

Case Id 109715

Name DHCD - Office of Rehabilitation Services - Deferred Loan Program

Program CDBG-Capital Projects

Status Quarterly Report Submitted

Reports

Quarterly Report (2 of 4)

ID	DATE RANGE	AVAILABLE	DUE	STATUS	REPORT	# FILES	SUBMITTED BY	ACTION
1904	7/1/2023-9/30/2023	9/30/2023	10/15/2023	Complete	5 of 5 steps completed	5	david.fielder@baltimorecity.gov 1/31/2024 2:45:48 PM	...
1905	10/1/2023-12/31/2023	12/31/2023	1/15/2024	Complete	5 of 5 steps completed	5	david.fielder@baltimorecity.gov 1/31/2024 2:48:59 PM	...
1906	1/1/2024-3/31/2024	3/31/2024	4/15/2024	Past Due		0		...
1907	4/1/2024-6/30/2024	6/30/2024	7/15/2024	Past Due		0		...

Accomplishment Reporting - 2

- Review & complete Parts 1 – 4.
- Questions? Ask CDBG Monitor before submitting report.
- Submit
- Save / Complete & Continue.

The screenshot shows a web application interface for reporting accomplishments. On the left is a navigation sidebar with categories: ACCOUNT, REPORTS (highlighted with a red box and containing a notification for 2 reports due), ACCOMPLISHMENTS, DRAW REQUESTS, APPLICATION, DOCUMENTS, and USERS. The main content area displays case information: Case Id 109715, Name DHCD - Office of Rehabilitation Services - Deferred Loan Program, Program CDBG-Capital Projects, and Status Quarterly Report Submitted. A breadcrumb trail 'Reports > Quarterly Report > 1906' is highlighted with a red box. Below this is a navigation bar with checkboxes for 'Part 1 - Goals', 'Part 2 - Accomplishments', 'Part 3 - Narrative and Supporting Documents', 'Part 4 - Required Documents', and 'Submit'. The main form area is titled '1. Deferred Loan Program' with the objective 'Assist homeowners in correcting major housing deficiencies and serious health and safety issues'. It contains two text input fields: 'Progress' (with placeholder 'Enter goal progress here...') and 'Difficulties Encountered' (with placeholder 'Enter any difficulties encountered here...'). At the bottom, there are two buttons: 'Save' and 'Complete & Continue', both highlighted with a yellow box.

Draw Request

- Click on Draw Requests tab.
- Example of Canceled Draw Request – Orange Box

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ACCOUNT

REPORTS
****2 REPORTS DUE**

ACCOMPLISHMENTS

DRAW REQUESTS

APPLICATION

DOCUMENTS

USERS

Case Id 109715

Name DHCD - Office of Rehabilitation Services - Deferred Loan Program

Program CDBG-Capital Projects

Status Quarterly Report Submitted

Draw Requests

ID	STATUS	WORKFLOW	DETAILS	REQUESTED DATE	REQUESTED AMOUNT	DISBURSED DATE	DISBURSED AMOUNT
7507	Cancelled	0 of 2	Quarter 1	10/9/2024	\$0.00	N/A	N/A

Add a Draw



Draw Request - continued

- Enter description to advance.
- Naming Protocol: ABC Organization_Draw 1_CD-50, ABC Organization_Draw 2_CD-50
- Naming protocol for Draw Form: ABC Organization_Draw Form 1_CD-50, ABC Organization_Draw Form 2_CD-50

ADD A DRAW

Request Date 10/9/2024

Description Enter description

Add

Home

ACCOUNT

REPORTS **2 REPORTS DUE

ACCOMPLISHMENTS

DRAW REQUESTS

APPLICATION

DOCUMENTS

USERS

Case Id 109715

Name: DHCD - Office of Rehabilitation Services

Program CDBG-Capital Projects

Status Quarterly Report Submitted

REQUESTED DATE	REQUESTED AMOUNT	DISBURSED DATE	DISBURSED AMOUNT
10/9/2024	\$0.00	N/A	N/A

Draw Requests

Add a Draw

Draw Request - continued

- Upload Draw Form. Use naming protocol for doc. Yellow Box.
- Enter amount requested. Orange Box.

Home

ACCOUNT

REPORTS
**2 REPORTS DUE

ACCOMPLISHMENTS

DRAW REQUESTS

APPLICATION

DOCUMENTS

USERS

Draw Requests > Draw Id: 7508

Status	Not Submitted	Amount Requested	\$0.00
Date Requested	10/9/2024	Amount Approved	\$0.00

Request Workflow 0 of 2*

****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

ABC Organization_Draw 1_CD-50

DOCUMENTATION

Upload File

DETAILS

CATEGORY	ORIGINAL AMOUNT	- OTHER DISBURSEMENTS	= AVAILABLE BALANCE	AMOUNT REQUESTED
Program Costs Example Funding Source	\$ 1.00	\$ 0.00	\$ 1.00	\$ 0.00
Totals	\$ 1.00	\$ 0.00	\$ 1.00	\$ 0.00

Draw Request –cont.

- Enter amount requested. Orange Box.
- Click Submit or Cancel. (See slides 18 & 25 for Cancel example.)



DETAILS

CATEGORY	ORIGINAL AMOUNT	- OTHER DISBURSEMENTS	= AVAILABLE BALANCE	AMOUNT REQUESTED
Program Costs <i>Example Funding Source</i>	\$ 1.00	\$ 0.00	\$ 1.00	\$ 0.00
Totals	\$ 1.00	\$ 0.00	\$ 1.00	\$ 0.00

Last updated by david.fielder@baltimorecity.gov on 10/9/2024 3:42:50 PM

Draw Request – continued

- Confirmation of draw amount
- Click Proceed or Cancel.

The screenshot displays a web application interface for managing draw requests. A central dialog box titled "CONFIRM" is overlaid on the page, asking for confirmation to submit a draw for \$0.50. The background interface includes a sidebar with navigation options like ACCOUNT, REPORTS, ACCOMPLISHMENTS, DRAW REQUESTS, APPLICATION, DOCUMENTS, and USERS. The main content area shows a "SUMMARY" section with a text input field containing "ABC Organization_Draw 1_CD-50" and an "Upload File" button. Below this is a "DETAILS" section with a table showing financial data.

CATEGORY	ORIGINAL AMOUNT	OTHER DISBURSEMENTS	= AVAILABLE BALANCE	AMOUNT REQUESTED
Program Costs Example Funding Source	\$ 1.00	\$ 0.00	\$ 1.00	\$ 0.50
Totals	\$ 1.00	\$ 0.00	\$ 1.00	\$ 0.50

Last updated by david.felder@baltimorecity.gov on 10/9/2024 3:42:58 PM

Draw Request – continued

- Confirmation of draw request submitted successfully.
- Click Confirm.

The screenshot displays a web application interface for managing draw requests. A central modal dialog box titled 'INFORMATION' is open, displaying the message 'Draw Request submitted successfully' and a 'Confirm' button. The background page shows a 'Request' workflow at step 0 of 2. The 'SUMMARY' section contains the text 'ABC Organization_Draw 1_CD-50' and a note that no files were uploaded. The 'DETAILS' section features a table with financial data.

CATEGORY	ORIGINAL AMOUNT	- OTHER DISBURSEMENTS	+ AVAILABLE BALANCE	AMOUNT REQUESTED	AMOUNT APPROVED
Program Costs Example Funding Source	\$ 1.00	\$ 0.00	\$ 1.00	\$ 0.50	\$ 0.00
Totals	\$ 1.00	\$ 0.00	\$ 1.00	\$ 0.50	\$ 0.00

Last updated by david.fielder@baltimorecity.gov on 10/9/2024 3:54:54 PM

Draw Request - continued

- Neighborly shows amount requested. Blue Box
- Requests & Workflow Tabs. Yellow Box.

Home

ACCOUNT

REPORTS
**2 REPORTS DUE

ACCOMPLISHMENTS

DRAW REQUESTS

APPLICATION

DOCUMENTS

USERS

Draw Requests > Draw Id: 7508

Status	Submitted	Amount Requested	\$0.50
Date Requested	10/9/2024	Pending Approval	\$0.00

Request: Workflow 0 of 2*

SUMMARY

ABC Organization_Draw 1_CD-50

DOCUMENTATION

**No files uploaded

DETAILS

CATEGORY	ORIGINAL AMOUNT	- OTHER DISBURSEMENTS	= AVAILABLE BALANCE	AMOUNT REQUESTED	AMOUNT APPROVED
Program Costs	\$ 1.00	\$ 0.00	\$ 1.00	\$ 0.50	\$ 0.00
Example Funding Source					
Totals	\$ 1.00	\$ 0.00	\$ 1.00	\$ 0.50	\$ 0.00

Draw Request - continued

- Visualization of draw & funding status . Blue Box.

Home

ACCOUNT

REPORTS
****2 REPORTS DUE**

ACCOMPLISHMENTS

DRAW REQUESTS

APPLICATION

DOCUMENTS

USERS

Case Id 109715

Name DHCD - Office of Rehabilitation Services - Deferred Loan Program

Program CDBG-Capital Projects

Status Quarterly Report Submitted

Draw Requests

Requested \$0.50

- Disbursed \$0.00
- Pending \$0.50
- Short Paid \$0.00

ID	STATUS	WORKFLOW	DETAILS	REQUESTED DATE	REQUESTED AMOUNT	DISBURSED DATE	DISBURSED AMOUNT
7508	Submitted	0 of 2	ABC Organization_Draw 1_CD-50	10/9/2024	\$0.50	N/A	N/A
7507	Cancelled	0 of 2	Quarter 1	10/9/2024	\$0.00	N/A	N/A

Add a Draw

Task Assignment – Response & Completing

- Task assignment.

Task Assignment for Housing Preservation Programs

Neighborly Software <no-reply@neighborlysoftware.com>
To: Fielder, David (DHCD) Thu 5/9/2024 10:36 AM

Some content in this message has been blocked because the sender isn't in your Safe senders list. [Trust sender](#) [Show blocked content](#)

CAUTION: This email originated from outside of Baltimore City IT Network Systems.
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Case Name: Bo [REDACTED]
Case Id: 42 [REDACTED]

Task Status: Active
Task Subject: Funding
Task Due Date: 5/10/2024
Task Details: This case h [REDACTED]

Task Owner(s): David Fielder - david.fielder@baltimorecity.gov, St [REDACTED]
Task Follower(s): Cheryl M [REDACTED]

<https://portal.neighborlysoftware.com/BALTIMOREMD/administration>

Task Assignment – Response & Completing

- View all tasks on Neighborly dashboard.

The screenshot shows the Neighborly dashboard for a user named David. The dashboard includes a header with the Baltimore City Department of Housing & Community Development logo and a welcome message. Below the header, there is a 'My Tasks' section highlighted with a red box. This section contains a table of task assignments with columns for Task ID, Case, Subject, Status, Due Date, and Action. The 'Action' column is highlighted with a blue box, showing 'View Task' links for each row. A 'Show Item Type' dropdown menu is set to 'Complete (5)'. The URL at the bottom of the page is <https://portal.neighborlysoftware.com/baltimoremd/Participant>.

Task ID	Case	Subject	Status	Due Date	Action
13155	98227: FY 23 Emergency Roof Repair Program	CD-48 Quarterly Reports	Complete	8/11/2023	View Task
13154	98228: FY 23 Deferred Loan Program	CD-48 Quarterly Reports	Complete	8/11/2023	View Task
13110	98226: DHCD - Office of Rehabilitation Services	Quarterly Report	Complete	8/7/2023	View Task
13180	98226: DHCD - Office of Rehabilitation Services	DUE: FOUR CD-48 QUARTERLY REPORTS	Complete	8/15/2023	View Task
13341	98226: DHCD - Office of Rehabilitation Services	DUE: HOUSING SALES CONSTRUCTION REHAB SPREADSHEET	Complete	8/18/2023	View Task

Task Assignment – Response & Completing

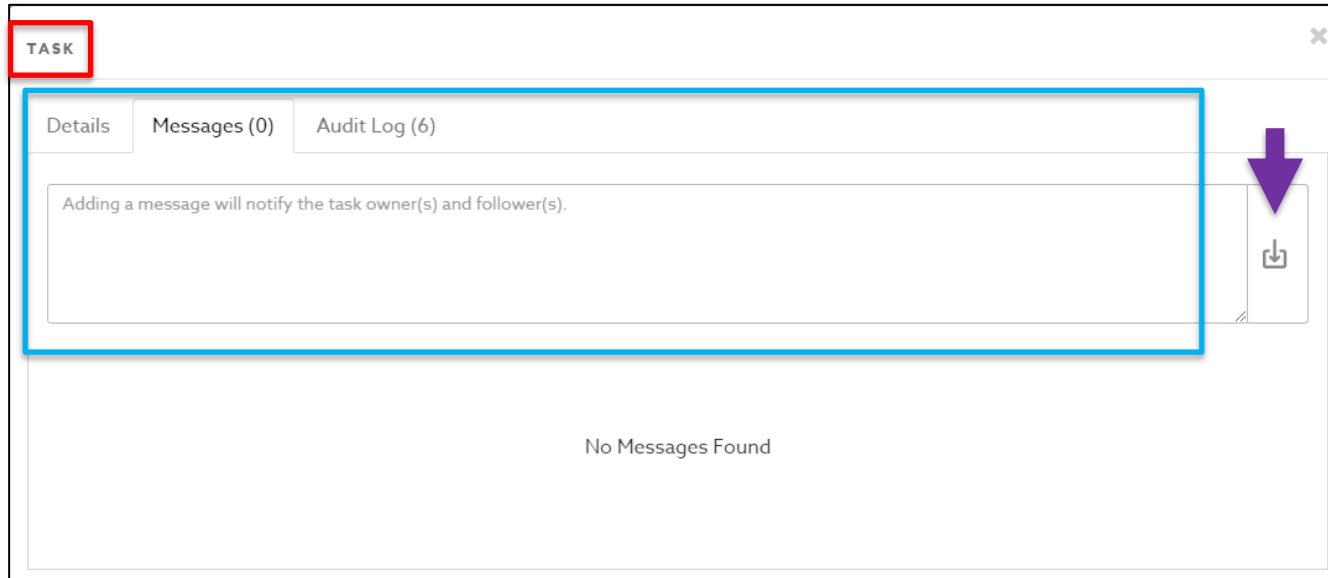
- View specific task.

The screenshot shows a task assignment interface with the following elements:

- Details:** A red box highlights the "Details" tab, and a purple arrow points to the "Messages (0)" link.
- Subject:** A blue box highlights the "Subject" field containing "CD-48 Quarterly Reports".
- Details:** A blue box highlights the task description: "Please submit all Quarterly reports so the accomplishments can be included in the annual report to HUD (CAPER). Please upload a completed 'Housing..."
- Status:** A yellow box highlights the "Status" dropdown menu, which is currently set to "Complete".
- Due Date:** A white box highlights the "Due Date" field, which is set to "8/11/2023".
- Owner(s):** A list of owners including "David Fielder" and a redacted name.
- Follower(s):** A list of followers including "David Herman", "LaTonya Lewis", "Romilla David", and "Susan Moriarty".
- ATTACHMENTS:** A section indicating "**No files uploaded**".
- Metadata:** Text at the bottom stating "Created by susan.moriarty@baltimorecity.gov at 8/4/2023 11:46:40 AM" and "Last updated by david.fielder@baltimorecity.gov at 2/1/2024 9:44:18 AM".
- Save:** A green box highlights the "Save" button.

Task Assignment – Response & Completing

- Respond to the Task Follower.



Task Assignment – Response & Completing

- Response to Task via Neighborly

Delete Archive Reply Reply all Forward Zoom Read / Unread Categorize Flag / Unflag

New Task Message Posted for Housing Preservation Programs

NS Neighborly Software<no-reply@neighborlysoftware.com>
To: Fielder, David (DHCD) Thu 5/9/2024 10:40 AM

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Case Name: [REDACTED]
Case Id: 421 [REDACTED]

Task Name: Funding
Task Id: 16660

Message Posted By: david.fielder@baltimorecity.gov
Message: This case had [REDACTED]

Click here to login: <https://portal.neighborlysoftware.com/BALTIMOREMD/administration>

Reply Forward

Task Assignment – Response & Completing

- Completion of Task
- **Do not upload documents to task unless directed by CDBG staff. Upload documents in appropriate Neighborly location.**

Task Assignment for Housing Preservation Programs

Neighborly Software <no-reply@neighborlysoftware.com>
To: Fielder, David (DHCD)
Thu 5/9/2024 10:40 AM

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Case Name: [REDACTED]
Case Id: 42 [REDACTED]

Task Status: Complete
Task Subject: Funding
Task Due Date: 5/10/2024
Task Details: This case [REDACTED]

Task Owner(s): David Fielder - david.fielder@baltimorecity.gov
Task Follower(s): Cheryl [REDACTED]

<https://portal.neighborlysoftware.com/BALTIMOREMD/administration>