How to create a user profile in Zengine

Background

Beginning in October 2020, CT BOS will no longer accept documents submitted by email for Renewal Evaluations, the annual CoC Competition, Requests for Proposals, Project Monitoring, etc. **Each CT BOS project listed on the project list must create a user profile in Zengine. Projects that don't sign-up in Zengine, will be unable to submit required documents.**

Instructions:

- In some cases, a single CT BOS grant involves more than one provider agency. The attached project list divides those grants into subprojects (e.g., CT0286 A, B, C, etc.)
- Each CT BOS project (or, if relevant, subproject) will have one Zengine user account. That user account will be associated with the email address of the primary contact.
- Documents can only be submitted to CT BOS via the primary contact's Zengine account. Please be sure that all staff authorized to submit documents - at least two people – have access to the email and password for your primary contact's Zengine user account.
- When creating a Zengine user profile, you will assign the primary user and provide at least one secondary contact. A third contact is optional. Each project must also provide contact information for the associated provider agency's Executive Director and contact information for two people who have e-snaps access for your agency.
- Only the primary user should register for a Zengine account.
- Each CT BOS project (or subproject, if relevant) can have one Zengine user account, but each Zengine user can be associated with more than one project.
- If there is more than one provider agency involved in a CoC grant (i.e., the project is divided into subprojects on the attached project list) and/or if the project recipient is DMHAS or DOH, each provider agency must create a user profile in Zengine.
    - If the grant recipient is DMHAS or DOH, or if the grant is a YHDP grant, providers must enter the DMHAS, DOH or YHDP representative as the third contact.
    - Please indicate Lisa Callahan, Leigh Shields-Church or Kathleen Durand respectively.
- If there is no provider agency assigned to a DMHAS project, the DMHAS LMHA must create a user profile in Zengine.
- For provider agencies that have multiple CoC-funded projects:
    - If you want to use the same Zengine user account to submit documents for more than one project, follow the instructions below under #8.
    - If you want to use a different Zengine user accounts to submit documents for two or more projects, each primary user must create a Zengine User Profile.
    - Remember, each CT BOS project (or subproject, if relevant) can have **ONLY ONE** Zengine user account, but each Zengine user can be associated with more than one project.

A brief training webinar is available here.

Thank you for helping us to make CT BOS processes more efficient and less prone to human error! If you have any suggestions for improvements, please email the CT BOS Team at ctboscoc@gmail.com

Please see page 2 for Steps for Creating a User Profile in Zengine.

Steps for Creating a User Profile in Zengine

1. Before you start:
   - Be sure you have your project's CoC grant ID (e.g., CT0286A). This number is listed on the linked project list.
   - Determine with your agency who will serve as your primary and secondary contacts and be sure you have their names and emails.
   - Ensure at least two people from your agency are registered to use e-snaps and you have their names and email addresses. Click the following link to access the login page for e-snaps: https://esnaps.hud.gov/grantium/frontOffice.jsf. To create an e-snaps user account select "Create a Profile" from the e-snaps login page.
   - Ensure you have the email address for your agency's Executive Director.
2. Go to the Zengine document submission portal by clicking: https://webportalapp.com/sp/ctbos-documentsubmission, or cutting and pasting it into the web browser address field.

3. New users will be instructed to click **Sign Up**
   - Complete the fields, entering email address and creating a password
     - Follow instructions indicated for setting up a password:
       - Must contain at least one lowercase letter
       - Must contain at least one uppercase letter
       - Must contain one number
       - Must be between 8 and 32 characters
       - Must not be an email address
   - If applicable, affirm that you are authorized by your agency to submit data and/or documents into this database by clicking the check box. If you have not been authorized to do so by your agency, you may not submit any documents for them.
   - Click the blue "Sign Up" button upon completion of the above.
   - New Users will next be prompted to "Create a Profile"

Please click **"+Create a Profile to Get Started"** to begin, or "**Open**" if action is required on your profile. You can always edit your Profile by clicking "Edit".

Providers are responsible for creating a profile and reviewing it periodically to keep the information up to date. Each project will have one user account and is required to assign one primary and at least one secondary contact along with contact information for the agency Executive Director or equivalent, and the two e-snaps users for your agency. A third contact is optional. Account access (username and password) must be shared with anyone who is approved to submit documents for the agency. Please note that CT BOS will generate document request from contact information given.

If there is more than one provider agency for a particular project, or the recipient is DMHAS or DOH, each provider agency must create its own contact profile in Zengine. If your contact profile is for more than one CoC project, please email Shannon@HousingInnovations.us with the Grant numbers (e.g. CT1111) of the additional projects you wish to be connected to this profile. On grants with multiple providers, please take care to choose the appropriate Grant # (e.g. CT1111A, or CT1111B, etc.) from the dropdown menu.

You cannot move forward until you have completed your Profile.

Create a Profile to Get Started

- ▪ Click "Create a Profile to Get Started"

Profile ▾   Save Draft   Create Profile

Primary Contact Information

Every CoC Project is required to assign one primary and at least one secondary contact, Executive Director contact information, and two agency e-snaps users' contact information. Third contacts are optional.
Please note that, since the form only allows the choice of 1 HUD grant number, if this profile represents more than 1 HUD grant, send an email to Shannon@HousingInnovations.us with the additional grant #s that should be connected to the profile.

Contact Info First Name *

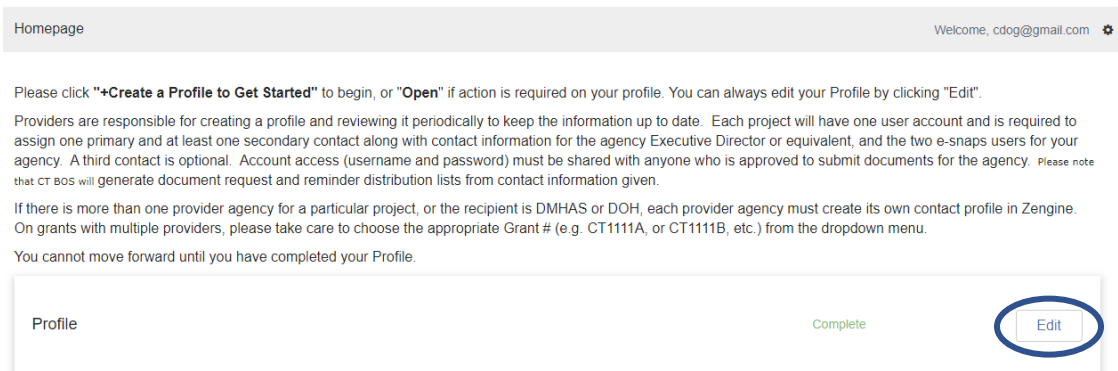**Contact Info Last Name** *

Contact Info Email *

Contact Phone Number *

4. Complete information input for the contact profile
5. All fields with an asterisk are required
6. You will be prompted to input the agency and project for this account. Try different name configurations of your agency name (e.g. Liberty Community Services, LCS, Inc., Liberty Com Svc.) or click on the dropdown and scroll through to find your agency if it is not coming up on first attempt. If your agency is not present on the dropdown list, select other and complete the additional fields that pop up.
7. **All providers are required to submit secondary contact information, and contact information for the agency's Executive Director or equivalent and the 2 e-snaps users.** Contact information for a third person is optional.
8. Users are only able to choose 1 project from the dropdown list for which they are the primary contact.
   o If you want to use the same Zengine user account to submit documents for more than one project, please send an email to Shannon@HousingInnovations.us. In the email, note the project ID (e.g. CT1111) for which you already designated yourself as primary in Zengine, and tell us all the additional project IDs for which you are the primary contact. The HI team will assign additional projects to your profile which will enable you to submit documents for each project and enable us to keep our contact list up to date ensuring emails and notices will get to the correct people.

- o If you want to use a different Zengine user account to submit documents for two or more projects, each primary user must create a Zengine User Profile.
- o Remember, each CT BOS project (or subproject, if relevant) can have **ONLY ONE** Zengine user account, but each Zengine user can be associated with more than one project.
- o If your project has been consolidated, please **choose the surviving grant** from the list.
  - ▪ Additional information on consolidations

9. Click "Create Profile" at the top or bottom right. If you need to leave and come back to it, you may click "Save Draft," and then edit and save when you return.
10. The Homepage will appear after you've created your profile with a green "Complete" to the right of "Profile"
11. If you would like to continue on to submit documents, follow the Document Submission Instructions.

Updating A User Profile in Zengine

1. Once created, the contact profile can always be updated by logging into the document submissions portal, and clicking the blue "Edit." This may be used to change any information already submitted, add information which was not added before (e.g. Third contact) and update the date that the contact information was most recently reviewed/edited. Once all changes are made, click the blue "Save Changes" button.

Homepage   Welcome, cdog@gmail.com ⚙

Please click **"+Create a Profile to Get Started"** to begin, or "**Open**" if action is required on your profile. You can always edit your Profile by clicking "Edit".

Providers are responsible for creating a profile and reviewing it periodically to keep the information up to date. Each project will have one user account and is required to assign one primary and at least one secondary contact along with contact information for the agency Executive Director or equivalent, and the two e-snaps users for your agency. A third contact is optional. Account access (username and password) must be shared with anyone who is approved to submit documents for the agency. Please note that CT BOS will generate document request and reminder distribution lists from contact information given.

If there is more than one provider agency for a particular project, or the recipient is DMHAS or DOH, each provider agency must create its own contact profile in Zengine. On grants with multiple providers, please take care to choose the appropriate Grant # (e.g. CT1111A, or CT1111B, etc.) from the dropdown menu.

You cannot move forward until you have completed your Profile.

Profile	Complete	Edit

To begin, click **"+Get Started"** below. When you return to this Homepage, you can see the status of your submission by the colored status bar below the submission card.
- If the status bar is gray, your submission is under review, and no action needs to be taken.

2. Changing Users
   a. Any user other than the primary user can be changed using the process above.
   b. To change the primary user, email us at ctboscoc@gmail.com to let us know you wish to change the primary user. We will take the necessary steps and let you know how and when to proceed to set up the new information.

CT BOS Email List Registration

1. Contacts provided via Zengine (i.e., the primary user, secondary contact, and third contact) will automatically be enrolled in the CT BOS grantee email list. These contacts need not register for the provider email list by going to the CT BOS website
2. Anyone wishing to receive emails sent to the CT BOS Steering Committee must register for the for that list by visiting www.ctbos.org.