



## How to Create a Zengine Project Application Profile And Submit an Application for New Project Funding

### Background

Beginning with the 2021 Continuum of Care (CoC) Competition, the Connecticut Balance of State CoC (CT BOS) will only accept applications for new project funding submitted through a web-based application portal called Zengine. Organizations wishing to submit an application for new project funding in response to any CT BOS Requests for Proposals (RFPs) should follow the instructions below. For information about any current funding opportunities, please visit <https://www.ctbos.org/hud-coc-application/>

### Steps for Creating a User Profile for a New Project Application in Zengine

1. Before you start:
  - Read the New Project Instructions 2021 at <https://www.ctbos.org/wp-content/uploads/2021/05/PSH-JTTHRRH-New-Project-RFP-instructions-2021-v5FINAL.pdf>, to determine if this funding opportunity is right for your organization and you wish to apply.
  - Determine with your agency who will serve as your primary and contact.
2. Go to the Zengine document submission portal by clicking: <https://webportalapp.com/sp/housinginnovations-combinedrfp>, or cutting and pasting it into the web browser address field.

#### Sign In/Sign Up Instructions

Enrolling as a Zengine user enables you to:

- submit Request for Proposal(s),
- assign yourself as RFP contact to be on the distribution list for receipt of:
  - information or document requests
  - notifications
  - reminders on important deadlines

Information contained within the Zengine profile is the **primary** way that CT BOS maintains an up-to-date contact list. Contacts are linked to the Constant Contact email distribution list to receive updates via that platform as well.

For New Users:

#### Sign In

Email

Password

Log In

[Forgot your password?](#)

#### Need an Account?

Sign Up

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”

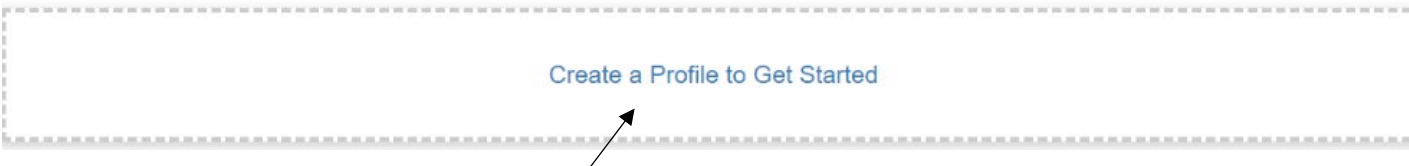
Prior to beginning this profile or project application, please read the instructions at {INSERT RFP INSTR LINK}. Also, see related Zengine instructions at the following link: [INSERT ZENGINE INSTR LINK]

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”.

Agencies submitting New Project Applications are responsible for creating a profile and reviewing it prior to submitting new proposals to keep the information up to date. When creating a Zengine user profile for new project submission, you will assign the contact person.

To reduce redundancies, basic agency information is requested on this profile. In this way, your agency will not have to submit that information with each project application should there be multiple entries for this new project submission opportunity.

Account access (email and password) must be shared with anyone who is approved to submit information for this new project application opportunity.



- Click “Create a Profile to Get Started” which brings you to the screen shown below.

Profile ▾

Save Draft

Create Profile

## 2021 REQUEST FOR PSH & JOINT TH/RRH PROPOSALS FUNDED THROUGH PH BONUS AND REALLOCATION

### INSTRUCTIONS

Please see important background information, instructions and priorities at **\*\*insert link here\*\***. It is important for providers to read the information at this link prior to completing this form.

- This form must be completed one time by all applicants; agencies applying for multiple projects must complete this form only once.
- Applicants must also complete all other relevant sections in the RFP submission portal at <https://webportalapp.com/sp/housinginnovations-combinedrfp>. You will be directed to enter those sections following submission of this profile.
- All fields marked with an asterisk are required and must be completed in order to submit.

#### 1. Project Applicant Information

##### a. Name of Organization \*

##### b. Organization Type \*

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 information for this account.
7. 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.
8. The Homepage will appear after you’ve created your profile with a green “Complete” to the right of “Profile”

9. Continue on to submit a new project application following the instructions below under “New Project Application”

## Updating An RFP Profile in Zengine

Once created, the RFP profile can always be updated by logging into the [RFP submissions portal](#), and clicking the blue “Edit.” This may be used to change any information already submitted. Once all changes are made, click the blue “Save Changes” button. Please note, that you may not make changes to the RFP, including the Profile with the agency questions after the deadline.

## New Project Application

### 1. On the bottom half of the Homepage click “Get Started”

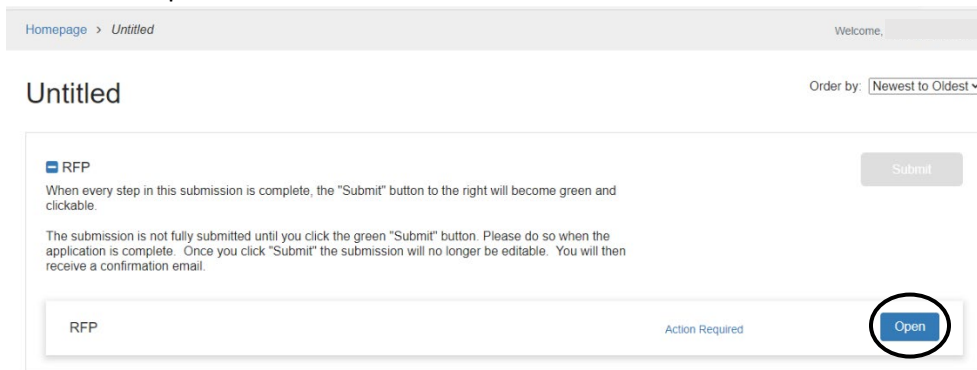
To begin click “+Get Started” below, or, if you have submitted previously, click “+Add Another.” When you return to this Homepage, you can see the status of your submission by the colored status bar below the submission card.

- If the status bar is gray, your submission is under review, and no action needs to be taken.
- If the status bar is blue, there is an action required. Click on the Submission Card to complete.
- If the status bar is red, there is an error. Please reach out to the Administrator of this program.



- a. If not first submission, click “+ Add Another”

### 2. Click the blue “Open” to continue



3. Fill in all required fields and all additional fields that are relevant for the application.
  - a. Should you get interrupted or need to complete later, you may “Save Draft” and return to this using the same submissions url.
4. Click “Mark Complete” in the bottom or top right, once all fields are complete.
5. If you missed a required field, you will be prompted to go back and complete. These fields will show up in pink and must be completed prior to submission. If they do not apply to your project, fill in N/A, or if the amount is 0, enter 0.
6. Upon marking complete, the following screen will appear with the project name at the top:

## Test RFP SQ

Order by: Newest to Oldes

### RFP

When every step in this submission is complete, the "Submit" button to the right will become green and clickable.

The submission is not fully submitted until you click the green "Submit" button. Please do so when the application is complete. Once you click "Submit" the submission will no longer be editable. You will then receive a confirmation email.



RFP	Complete	Edit
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7. The Submit button should now appear green. You MUST click the green "Submit" button to complete document submission.

8. Once the green "Submit" button is clicked, a message will appear saying "This has been submitted"

## | Test RFP SQ

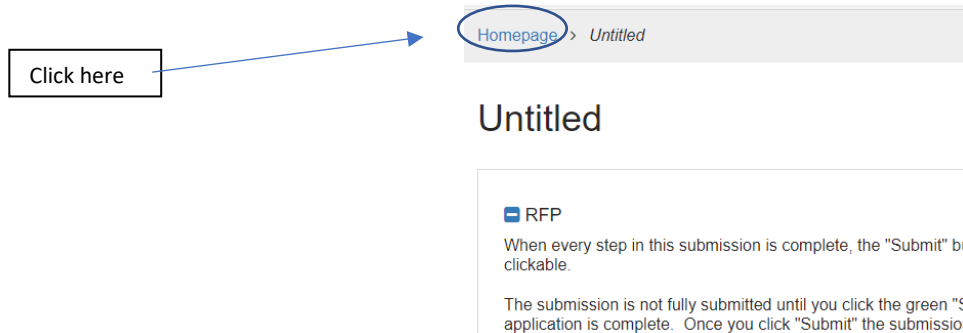
Order by: Newest to Oldest

<h3>RFP</h3> <p>Thank you for submitting.</p> <p>Your submission is now under review and you will be contacted if any additional information is needed.</p>	<p>This has been submitted.</p>
RFP	View

- Clicking view will display the document information just submitted. This enables you to download the document if desired.
- Once a document is submitted it is no longer editable.
  - Should you submit a document in error, please contact CT BOS at [ctboscoc@gmail.com](mailto:ctboscoc@gmail.com).

9. If you have additional RFPs to submit, go back to the Homepage by clicking "Homepage" at the top left of the screen or go to the following link:

<https://webportalapp.com/sp/home/housinginnovations-combinedrfp>.



## 10. And click the blue “+ Add Another”

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.
- If the status bar is blue, there is an action required. Click on the Submission Card to complete.
- If the status bar is red, there is an error. Please reach out to the Administrator of this program.



11. Follow the instructions starting at #2 above.

12. Repeat steps 8 through 10 as necessary to add multiple New Project Applications.

### Printing

Printing or saving to PDF is recommended after application submission. If you wish to print your submission or save as a PDF use the following steps:

- After submitting (step 8), click the “View” button
- Click the blue downward facing arrow to the right of “RFP”
- Click “Print Form” and adjust as necessary to either print or save as PDF