



Monitoring Document Submission Instructions for Providers

If you have **not yet created an account** and set up your profile, go back to the instructions in “[Create a Zengine Account](#)” and complete.

A note regarding accounts: There is only one Zengine user account per project, and in most cases per agency. As permitted by your agency, users may share login credentials to submit documents. For instance, someone who submits documents as a part of a monitoring visit might be a different person than the one who uploads consumer surveys for renewal evaluations. It is up to the provider agency to decide how many people have permission to submit documents and then to share the login information with each person who has permission.

If you have **previously created an account** and set up your profile and now need to submit a document, navigate to the Homepage of the submission portal by clicking on this link: <https://webportalapp.com/sp/ctbos-documentsubmission>. If there is action to be taken on your profile, you will be prompted to click “open” and complete any required fields that are blank and save changes.

If your profile set up is complete, proceed with the following:

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

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.



- a. If not first submission, click “+ Add Another”
2. Click the blue “Open” to continue



Untitled

Order by: Newest to Oldest

The newest steps will always be first. You can view your previous steps by clicking the "View" button.

When you have completed all steps, it will no longer state "Action Required" but "Complete". The "Submit" button will turn green, which indicates that you can now submit.

Documents Submissions Submit

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. Once you click "Submit" the submission will no longer be editable.

Document Submissions Action Required Open

If you have not started, please click the "Open" button to the right.

If you have already started, please click the "Open" button to the right to continue.

3. Fill in all fields.
 - a. In the Document Type field, choose the type that was requested when the link was sent, if applicable. If no document type was sent, choose the type most relevant for your document.
 - i. Please note, for Documents requested prior to a monitoring visit, please select "Monitoring Review Item"
 - b. Upload your document in the last field by clicking "select a file"
 - i. You will be directed to find the file on your device
 - ii. Select the file you desire to upload (the file title will show in the field next to "Select a file")
 - c. Should you get interrupted or need to complete later, you may "Save Draft" and return to this using the same document submissions url.
4. Click "Mark Complete" in the bottom right, once the correct file has been uploaded and all fields are complete.
5. Upon marking complete, the following screen will appear with the document and grant number at the top:

Homepage > CT0011 Grant Amendment Welcome, [user] ⚙

CT0011 Grant Amendment

Order by: Newest to Oldest

The newest steps will always be first. You can view your previous steps by clicking the "View" button.

When you have completed all steps, it will no longer state "Action Required" but "Complete". The "Submit" button will turn green, which indicates that you can now submit.

Documents Submissions Submit

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. Once you click "Submit" the submission will no longer be editable.

6. The Submit button should now appear green. You MUST click the green "Submit" button to complete document submission.



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

CT0011 Grant Amendment

Order by: Newest to Oldest

The newest steps will always be first. You can view your previous steps by clicking the "View" button.

When you have completed all steps, it will no longer state "Action Required" but "Complete". The "Submit" button will turn green, which indicates that you can now submit.

Documents Submissions

Thank you for submitting.

Your submission is now under review and you will be contacted if any additional information is needed.

This has been submitted.

- 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.
- If you have additional documents to upload, go back to the Homepage by clicking "Homepage" or go to the following link: <https://webportalapp.com/sp/home/ctbos-documentsubmission>.

Click here.

→

Homepage

Client List

Client List

The newest steps will always be first. You can view your previous steps by
When you have completed all steps, it will no longer state "Action Require

Documents Submissions

Thank you for submitting.

Your submission is now under review and you will be contacted if any

- 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.

+

Add Another

PA0001

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Approved

- Follow the instructions starting at #2 above.



Connecticut Balance of State Continuum of Care

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11. Repeat steps 8 through 10 as necessary to add multiple documents.