



Changing Contacts in Zengine

Background

CT BOS uses a web-based data system called Zengine for several purposes, including:

- Ensuring that we have an up-to-date contacts list for each CT BOS agency and the correct people get important information
- Ensuring that the correct people have access to the Renewal Evaluation Database (RED), which is the data system used to evaluate projects
- Enabling providers to submit critical documents, including Consumer Satisfaction Surveys not submitted via Survey Monkey, Requests for Proposals, and Project Monitoring Documents.

Each agency that receives CT BOS funding either directly from HUD or as a subrecipient through another agency must create and keep current a Zengine user profile. Agencies that receive DMHAS funds designated to provide services in a CT BOS Permanent Supportive Housing project, must also do so. Agencies that do not create an account in Zengine will be unable to access RED and submit required documents to CT BOS and may miss out on important communications. If you are unsure of whether your agency needs or already has a Zengine user profile, contact Shannon Quinn-Sheeran (shannon@housinginnovations.us).

Instructions to Change a Primary Contact

1. To change your agency's primary contact, email Shannon (shannon@housinginnovations.us), providing the name of your agency, name and email address for the new primary contact and reason for the change. Don't create a new primary contact profile. Rather, contact Shannon to update the agency's existing profile. This will ensure that your agency maintains access to records that have been previously submitted in Zengine and that the correct people maintain access in RED.
2. When the primary contact is changed, the new primary contact will receive an email instructing them to log in using this url: <https://webportalapp.com/sp/login/ctbos-documentsubmission>
3. Once you have logged in, click "Forgot your password?" to set a new password.
4. Share the new username and password with others at your agency who will need to update the profile and submit documents. Given staff turnover, absences and other unforeseen circumstances, CT BOS recommends that multiple staff have access to your Zengine account.

Instructions to Change Other Types of Contacts (not Primary)

If your agency has already created a Zengine account, and you need to update any type of contact other than the Primary Contact:

1. Log into Zengine using the primary contact's login and password
2. Update the relevant fields
3. Click the "save" button.

Instructions to Create a User Profile for an Agency without an Existing Zengine Account

See instructions on the [Zengine page](#).