eCivis Grants Network

# Application & Review Manager

# User Guide

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# Application & Review Manager Overview

When preparing to distribute grant funds, Grantors will use the Application & Review Manager to solicit for applications, collect reviewer feedback, and process award decisions. The awards are then approved and managed within the same systems (Grantors using Grants Network and Subrecipients using eCivis Portal).

Some of the key features include:

1. Workflow customization using Submission and Evaluation Stages
2. Process and form standardization using Templates
3. Form design and configuration
4. A single online portal for recipients to manage applications and awards via eCivis Portal
5. A single online portal for Reviewers to submit and manage feedback on applications
6. Dashboards and dynamic tables for monitoring application and review data

## Application & Review Manager Pre-Requisites

Grantors must obtain access to the following before accessing Application & Review Manager.

1. Access to eCivis Grants Network Account ["Grants Network"] (e.g., username/password)

2. Organization Master Account Holder (OMAH) must activate Permissions to **Access to Create/Manage Programs for Solicitation** for the designated account users.

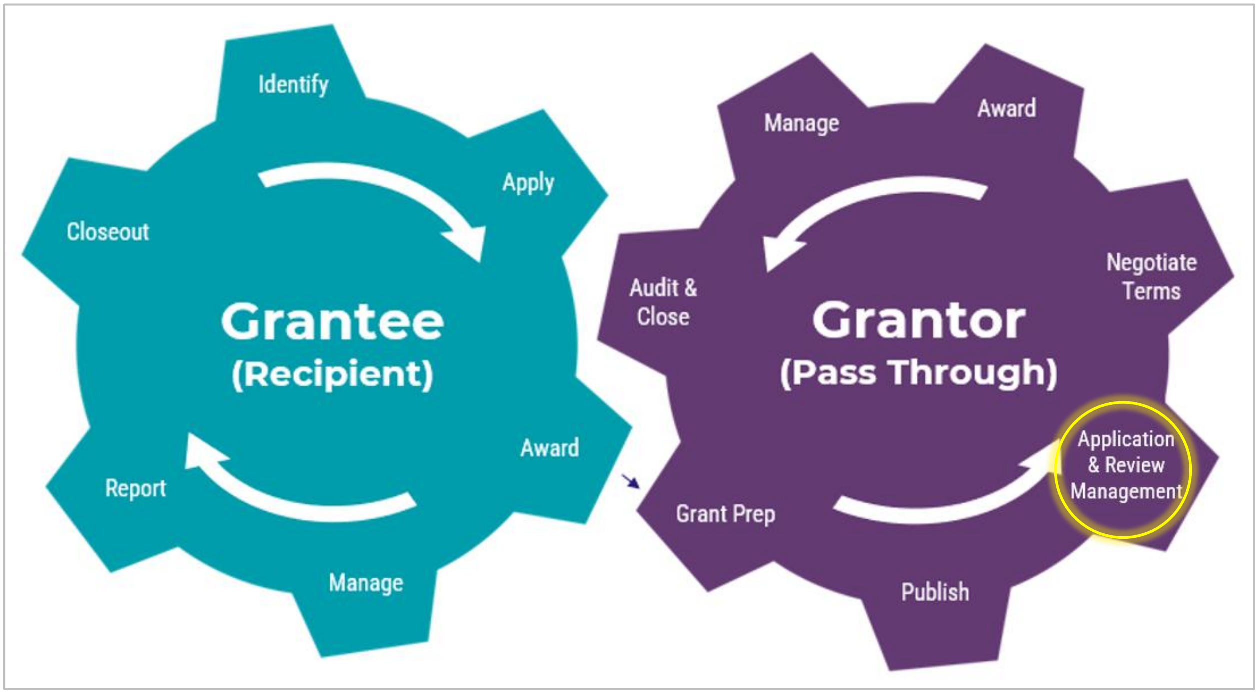
Applicants and Reviewers must obtain access to the following:

1. Access to eCivis Portal Account ["Portal"] (e.g., username/password)

# Lifecycle of a Grant

## Full Grants Lifecycle

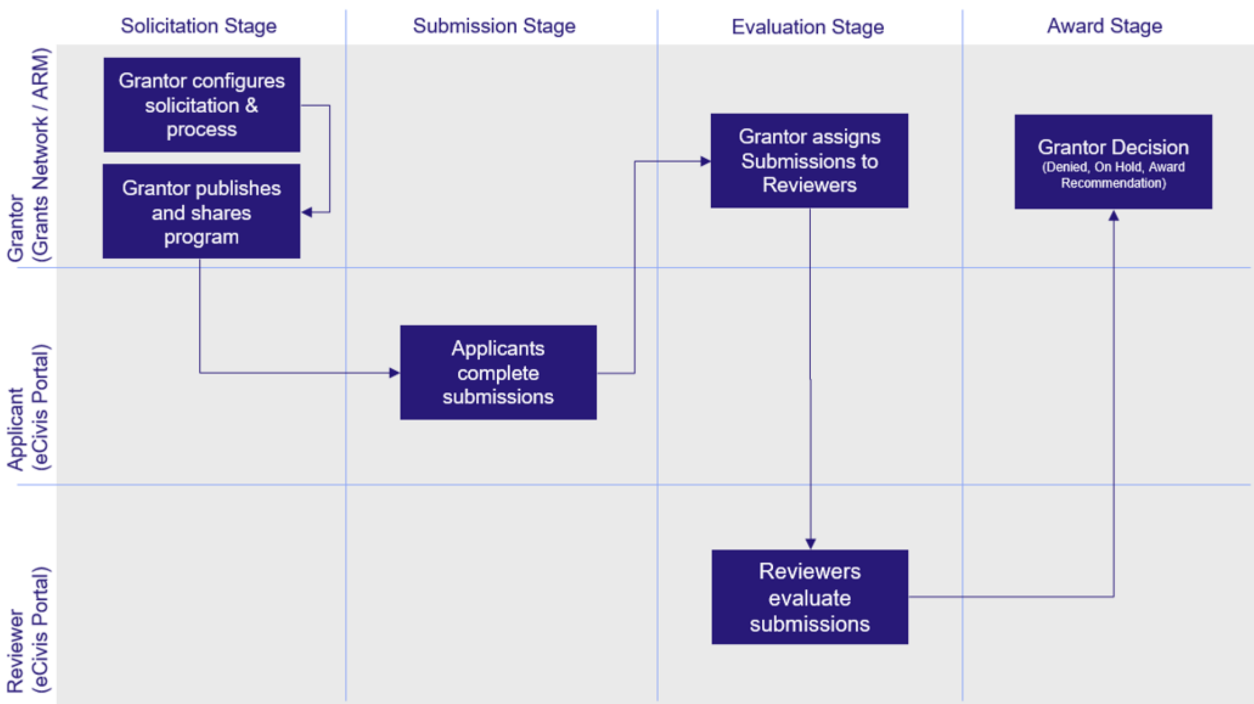
The lifecycle of a grant program depicted below outlines the process of a Grant Recipient (Grantee) managing the received funds as a Pass-Through Entity (Grantor). In the example of a competitive grant program, the Application & Review Management process involves coordinating communication among multiple stakeholders. This will be described further in the next section of this guide.



## The Competitive Award Process

The Application & Review Management system streamlines the interaction of Grantors, Applicants, and Reviewers across the 4 stages of the Competitive Award Process:

1. Solicitation Stage — Creating and sharing a Program Solicitation with prospective applicants
2. Submission Stage — Receiving application submissions from applicants
3. Evaluation Stage — Receiving Reviewer feedback on all applications submitted
4. Award Stage — Selecting applications to recommend or deny for award






EUNA Grants

## Roles

The following is a brief breakdown of the designated roles used in the Application & Review Management Process.

| Grantor (Grantmaker) | Applicant (Grantseeker) | Reviewer |
|---|---|---|
| • Utilize Grants Network to manage the Application and Review Management Process from initial Application Intake to Awarded (Recommend Award)<br>• Set Up the Program's Application Forms<br>• View All Program Applications, Overview Dashboard<br>• Manage Applications, Reviews, and Reviewers<br>• Manage Form/Process Templates | • Utilize eCivis Portal to submit Application<br>• Invite other Applicant Team Members<br>• View Status of current or previous Applications | • Utilize eCivis Portal to access Review Assignments<br>• Reviewer Evaluates Application and submits final feedback |

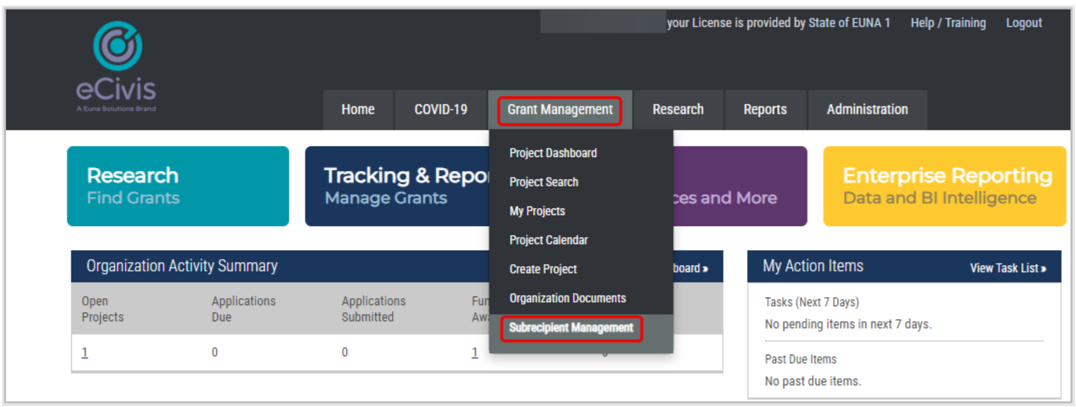
# Create a Competitive Award Solicitation

## Creating a New Program

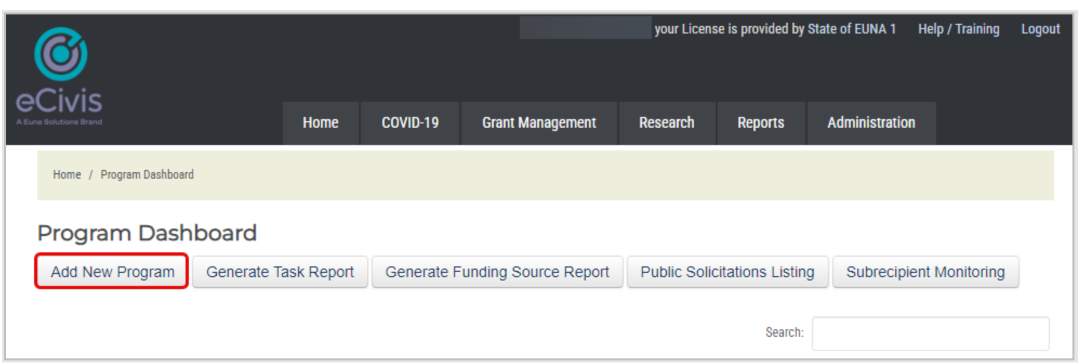
Grant Management Tab > Subrecipient Management > Program Dashboard > Add New Program

1. Log into Grants Network

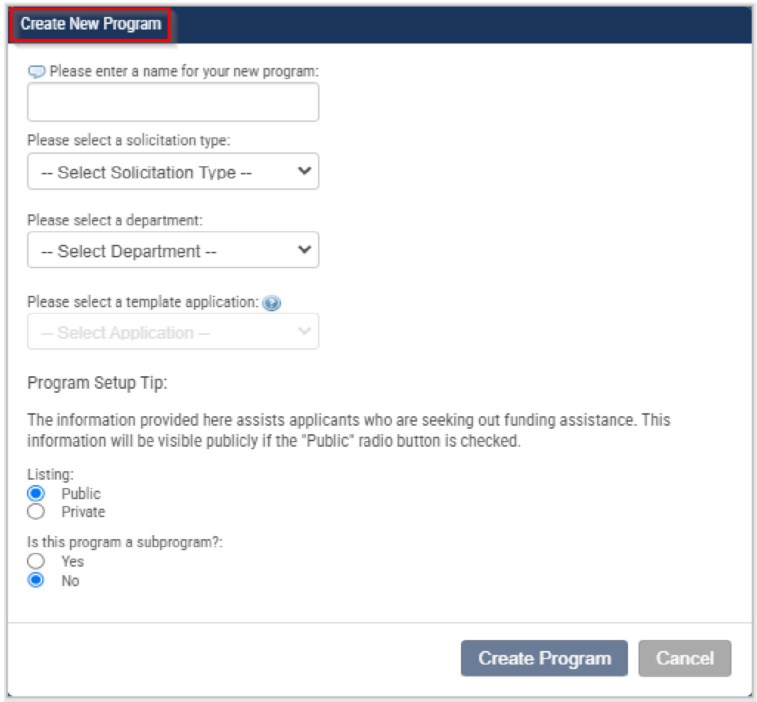
2. Once you are logged into Grants Network, click on the **Grant Management** tab, scroll down, and click on **Subrecipient Management**.



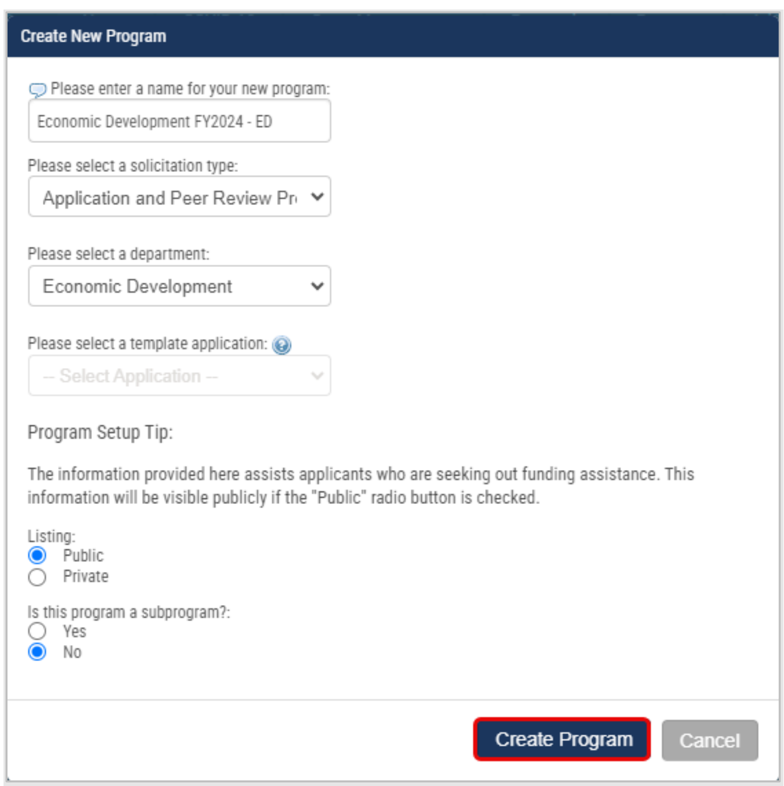

3. The Program Dashboard page will now appear on your screen. Scroll down and click on the **Add New Program** button.




4. To "Create New Program" fill in the following details:
   a. Enter a name for your new program
   b. Select a Solicitation Type (Select **Application and Peer Review Process** to proceed with the application and review functionality)
   c. Select a Department
   d. Listing
   e. Is this a Subprogram?




5. Once you have filled in information, click on **Create Program**.



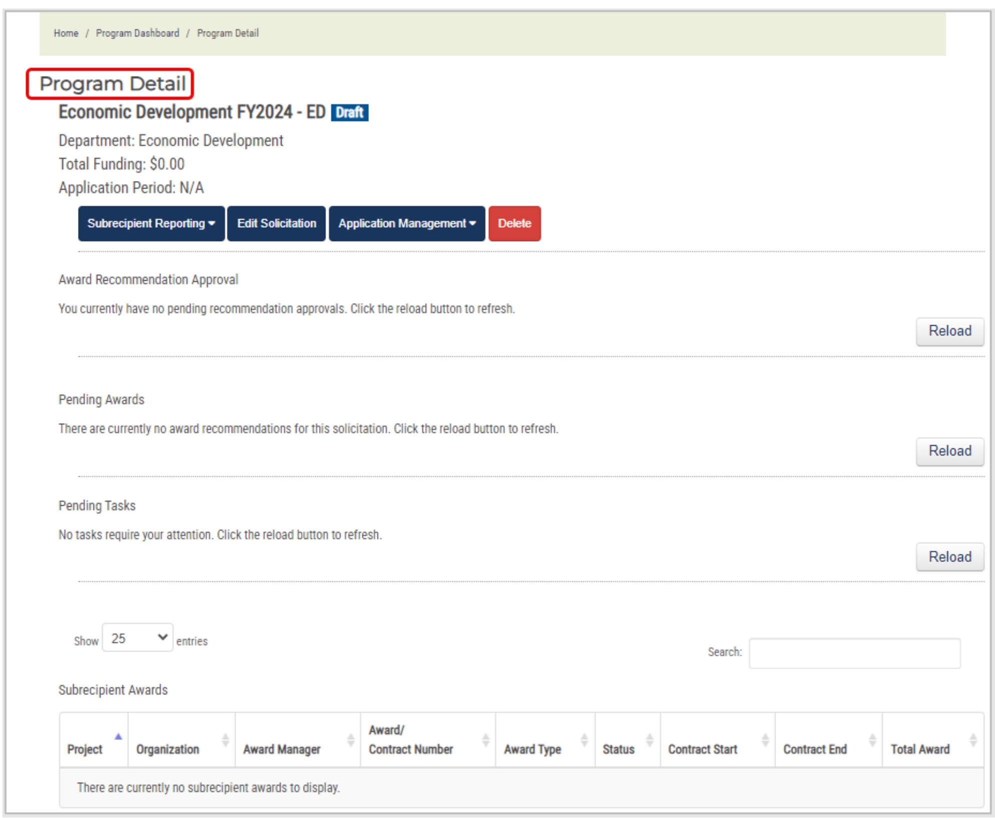
## Program Detail Page Overview

The Program Detail provides access to all program settings and activities related to solicitation and managing subrecipient awards. Below is a breakdown of each section of this page:

1. Program Detail
    a. Program Title
    b. Department
    c. Total Funding
    d. Application Period

2. Program Buttons
    a. Subrecipient Reporting
    b. Edit Solicitation
    c. Application & Review Manager
    d. Delete

3. Award Recommendation Approval
4. Pending Awards
5. Pending Tasks
6. Subrecipient Awards



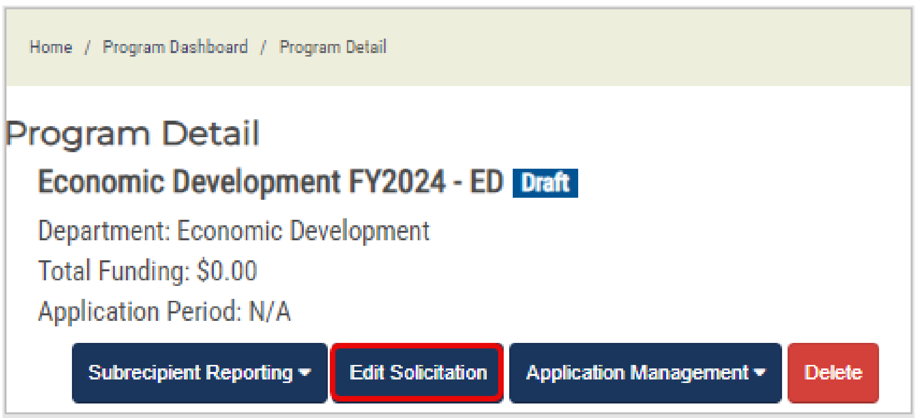
## Editing the Solicitation

Grant Management Tab > Subrecipient Management > Program Dashboard > Program Solicitations > Edit Solicitation Button

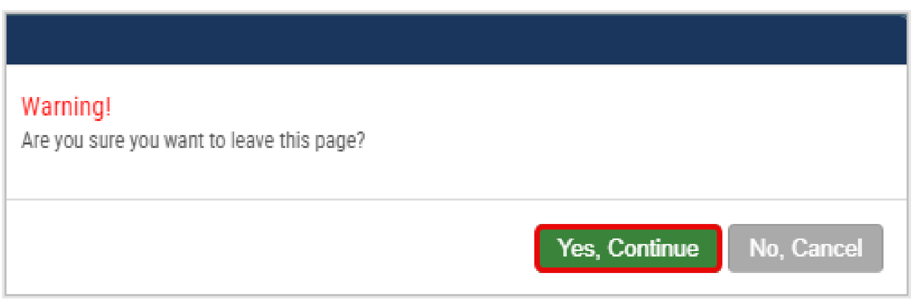
Use the Edit Solicitation page to design the public-facing description of your program solicitation as well as to configure how the program will manage applications, reviews, and subrecipient awards.

In order to publish your solicitation and begin collecting applications, you will need to edit the required details of the Edit Solicitation page. Simultaneously, prepare your application process, including stages and forms, in the Application Management section. The next section will guide you through the solicitation process.

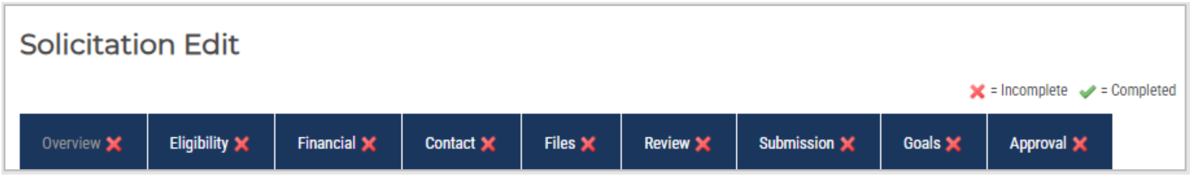
1. Click on **Edit Solicitation** button



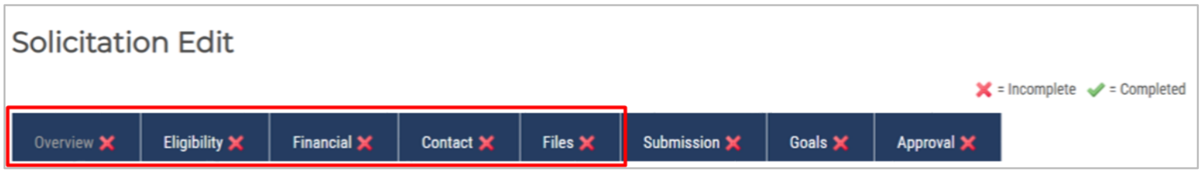

2. Click **Yes, Continue** to Edit Solicitation



3. You will save each tab until each displays a green checkmark. Once this is done, and your application process is built, you can proceed to publishing your solicitation.

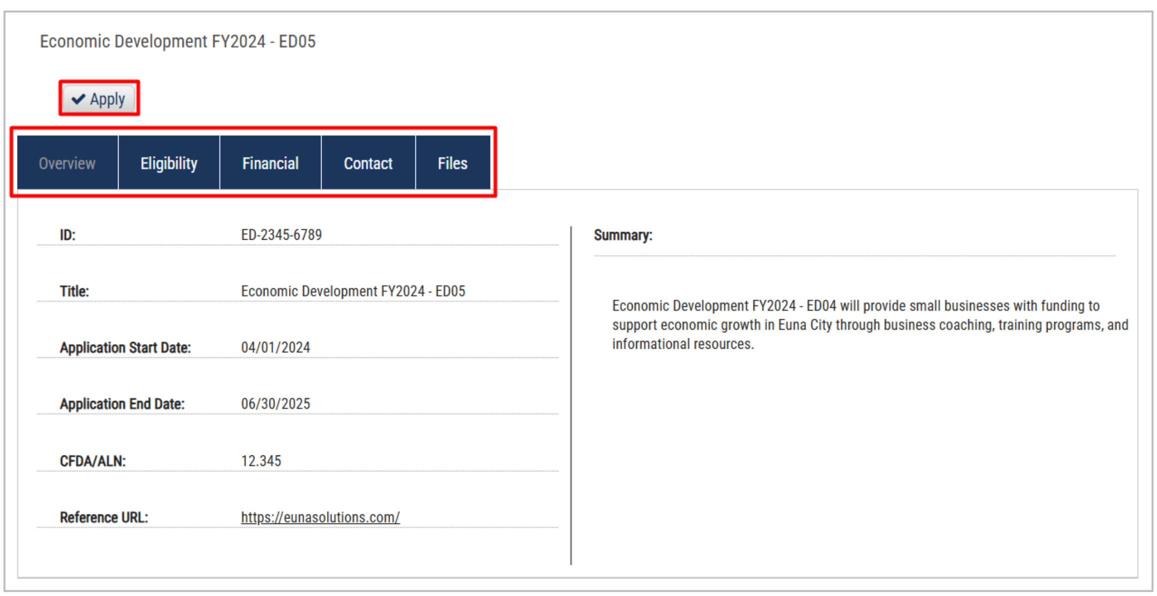



*Note: The following tabs will create the front end of the Program Solicitation:



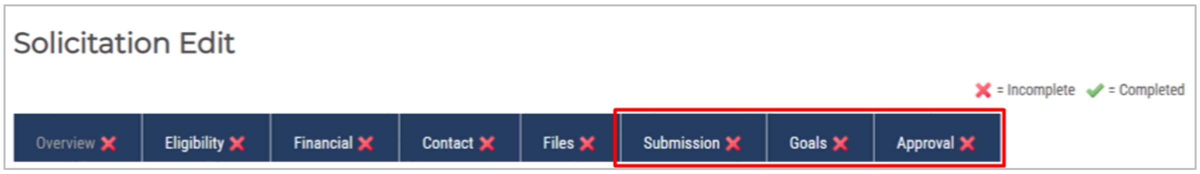

- Overview
- Eligibility
- Financial
- Contact
- Files

The external solicitation listing page, which you share with potential applicants, will display information from these tabs and include an Apply button to start the application process. To view the published solicitation, you must first complete the program publishing process (refer to the "Publishing a Program Solicitation" section of this guide).



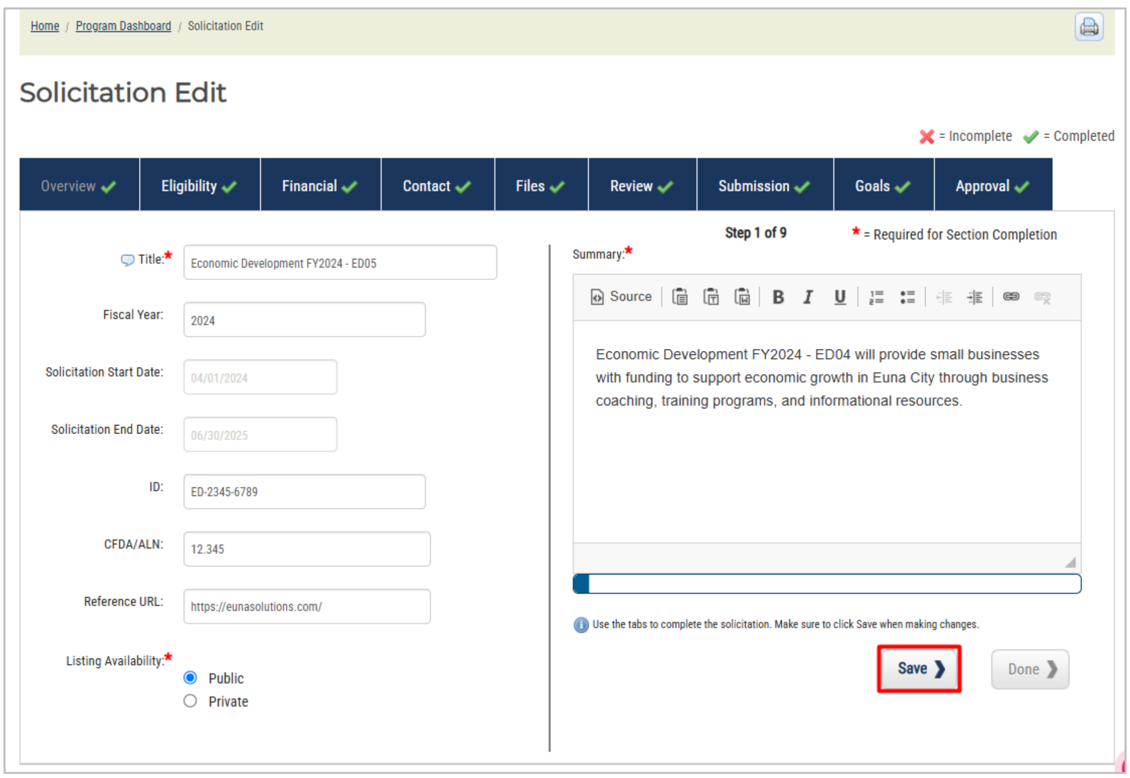
The remaining 3 tabs will control additional program settings and workflows:

- Submission
- Goals
- Approval




## Overview Tab

The Overview Tab contains introductory details to explain your program.




1. Fill in the required information (red asterisk) and any other necessary information.

   ***Note:** Solicitation Start and End Date are set in the Application and Review Manager, which will be covered in the Application Process section below

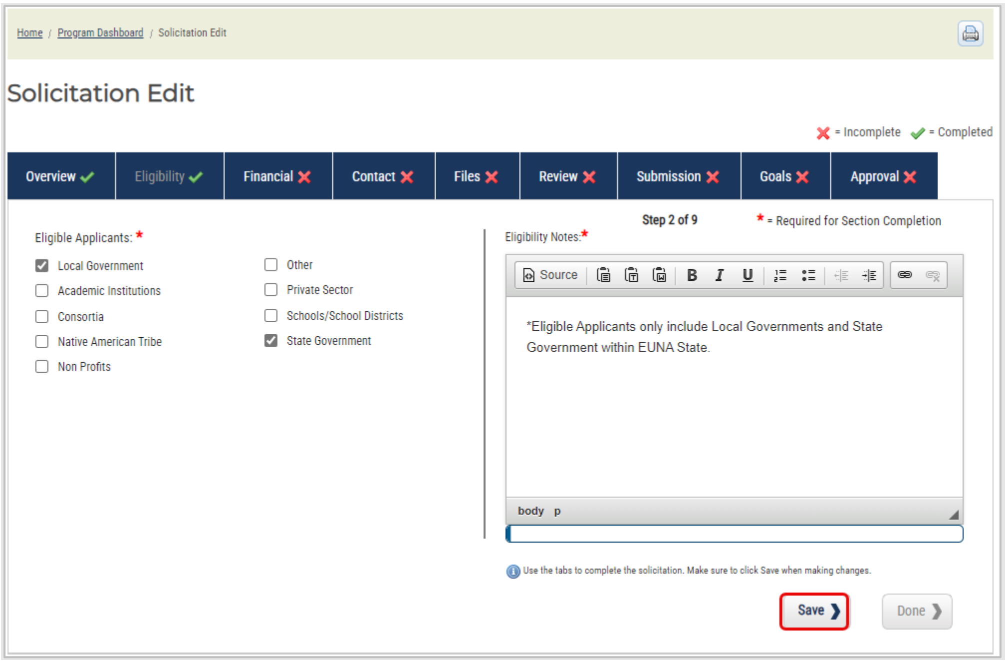
   ***Note:** For more information on the Listing Availability setting, refer to the "Sharing a Published Program Solicitation" section

2. Click **Save.**

3. A green Success Message will appear once this section has been completed, and a green checkmark will appear above the tab.

## Eligibility Tab

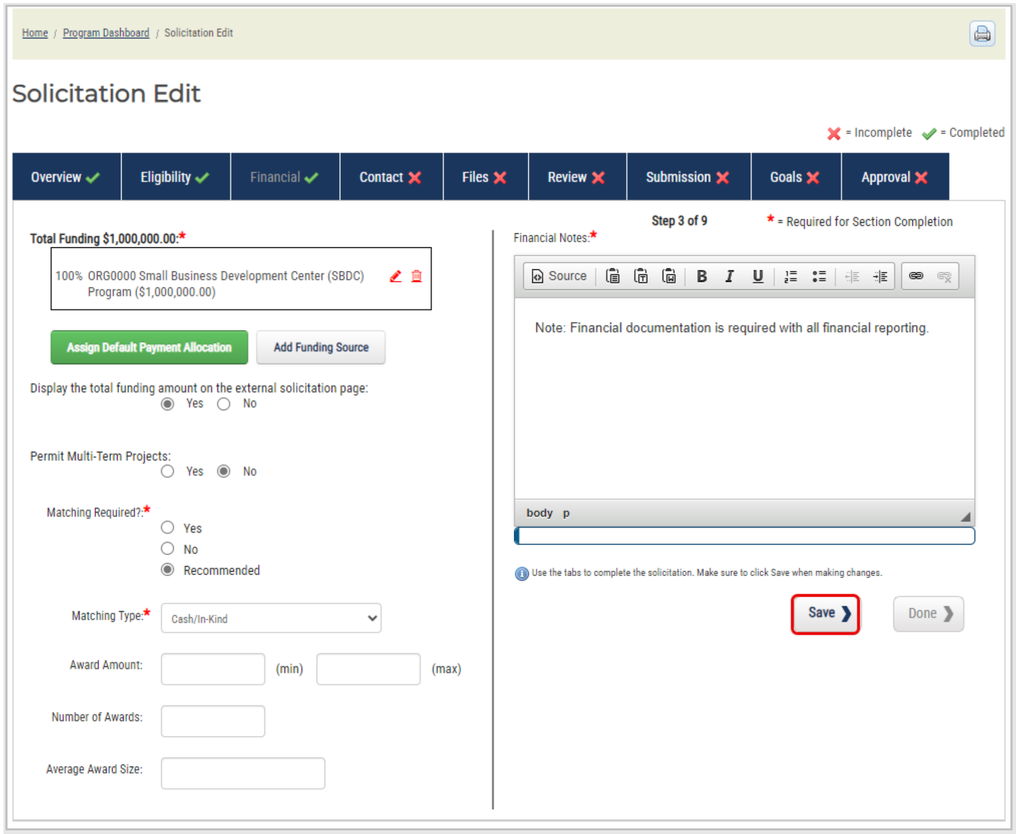
The Eligibility tab outlines which organizations are eligible to apply for this program and includes additional notes for clarification.



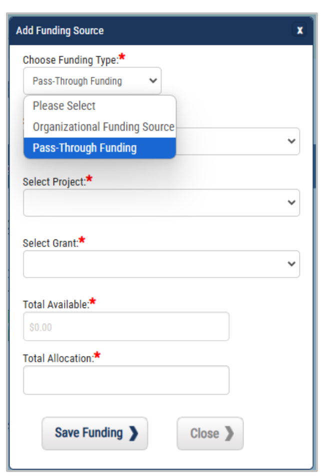

1. Fill in the required information (red asterisk) and any other necessary information.
2. Click **Save**.
3. A Green Success Message will appear once this section has been completed, and a green checkmark will appear above the tab.

## Financial Tab

The Financial tab provides details about the funding available for subrecipient awards, including the source of the funding and the parameters for how the funds are to be awarded and used.

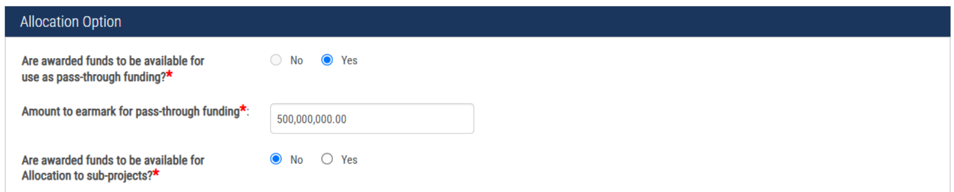



1. Fill in the required information (red asterisk) and any other necessary information.
    a. Add a Funding Source: To track the funds allocated to this program and its awards, add your funding sources. The dropdown will display a list of available funding sources and their remaining amounts.



i. **Pass-Through Funding:** Grant awards you receive and track within Projects can be "passed through" to support subawards you grant from a Program. This function must be done using Project Dashboards, which are part of Grant Management functions.

When a grant is marked as Awarded in the Project Dashboard, you'll see an option asking, "Are awarded funds to be available for use as pass-through funding?" Select **Yes** to make those funds available (all user roles can complete this step). Once selected, the available funds from that grant will appear in the dropdown list when assigning pass-through funding.



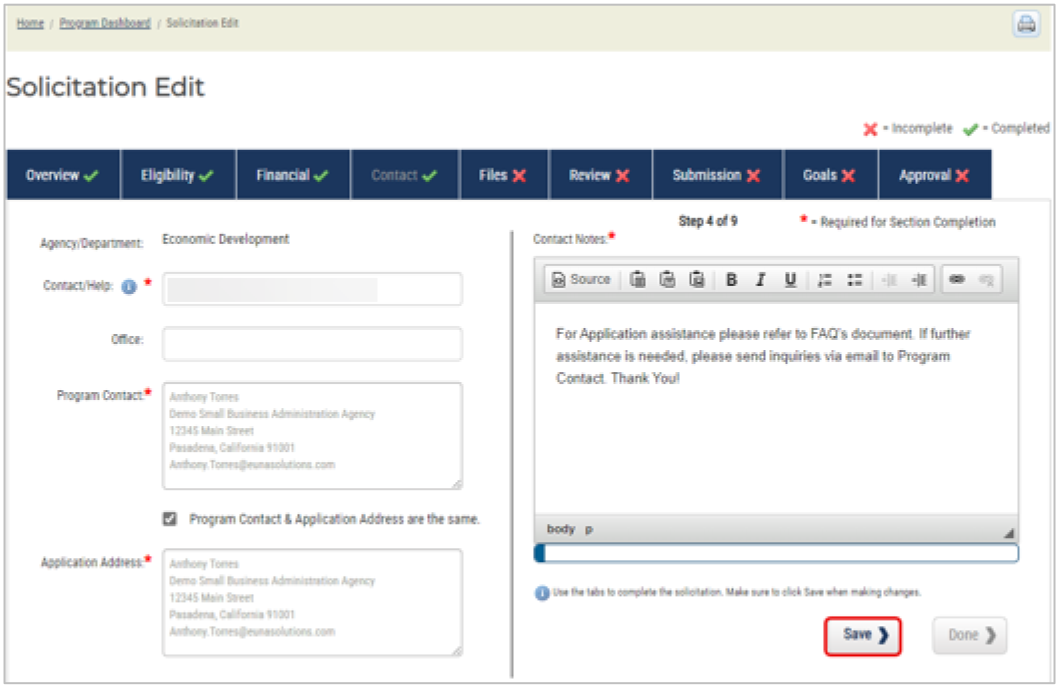

ii. **Organization Funding Source:** An Organization Funding Source is typically a non-grant fund — such as a tax revenue fund or a special purpose fund. These are set up by system administrators in the Funding Sources section under Administration settings. Designated users are then given permission to allocate these funds to Subrecipient Management Programs.

*__Note__: If you need an Organization Funding Source added to this drop-down list, check with your administrator. They will either need to create this fund or give you permission to access the funds they have created.

2. When finished, click **Save**.
3. A Green Success Message will appear once this section has been completed, and a green checkmark will appear above the tab.

## Contact Tab

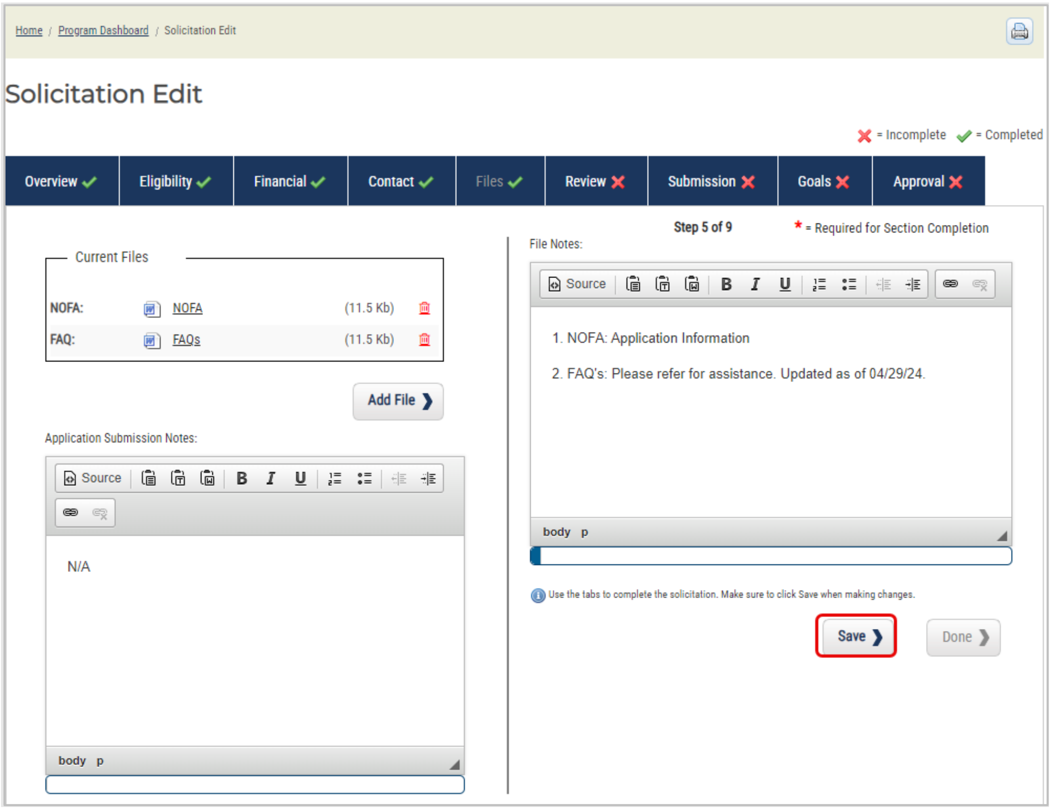
The Contact Tab displays an email address for questions and support, along with any other relevant contact information and instructions for applicants.




1. Fill in the required information (red asterisk) and any other necessary information.
2. Click **Save**.
3. A Green Success Message will appear once this section has been completed, and a green checkmark will appear above the tab.

## Files Tab

The Files Tab contains any files that applicants may need to download for reference or for completing their application.




1. Fill in the required information (red asterisk) and any other necessary information.

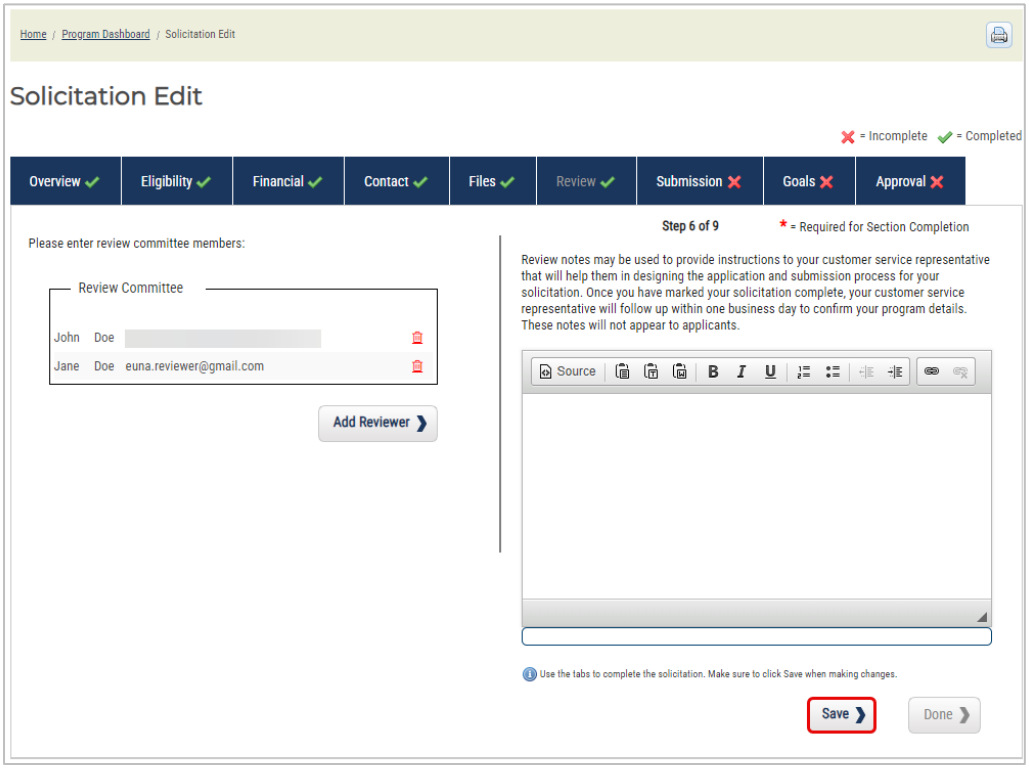
   ***Note:** You may also attach files directly to the application form for applicants to download. (See the "Application Form" section of this guide)

   ***Note:** You will NOT use the application submission notes box on this page.

2. Click **Save.**
3. A Green Success Message will appear once this section has been completed, and a green checkmark will appear above the tab.

## Review Tab

The Review tab lists the Review Committee Members who can be selected in the Application and Review Manager to evaluate applications within this program.




1. Fill in the required information (red asterisk) and any other necessary information.

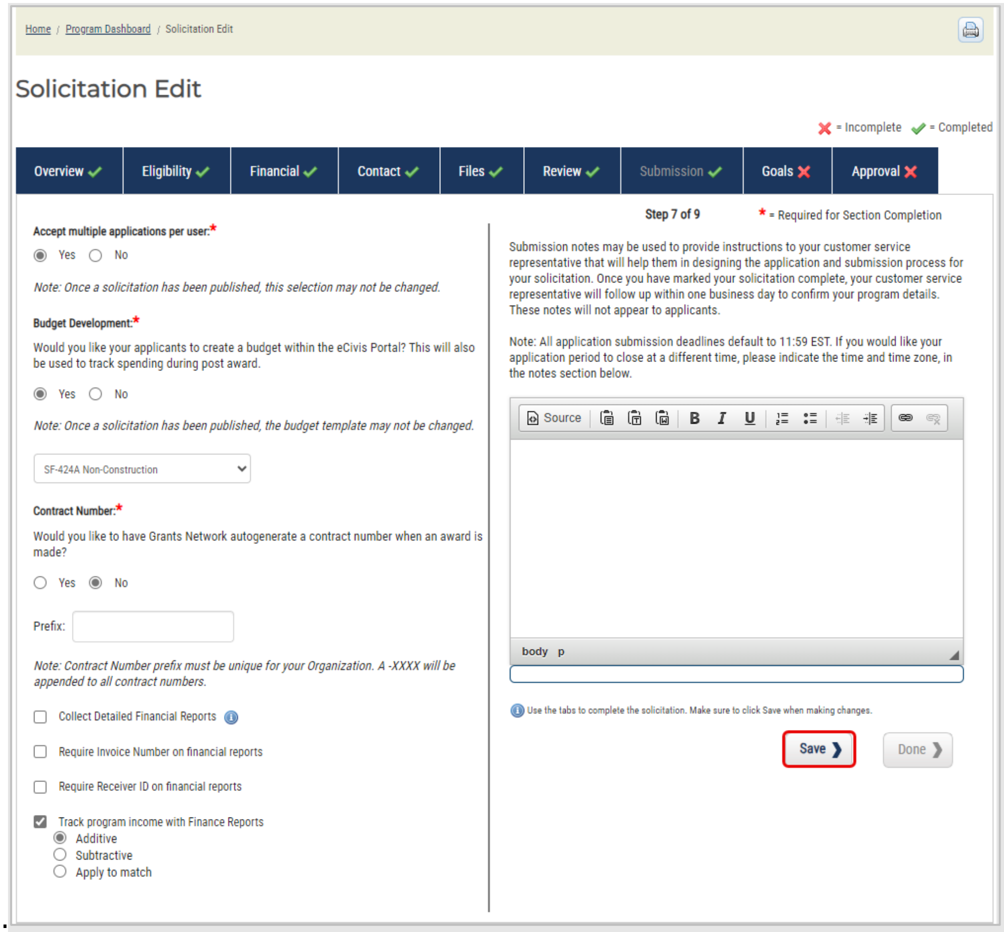
   ***Note:** Additional names can be added at any time during your application process if necessary.

   ***Note:** You will NOT use the review notes box on this page.

2. Click **Save.**
3. A Green Success Message will appear once this section has been completed, and a green checkmark will appear above the tab.

## Submission Tab

The Submission tab dictates how the program will accept application data and format subrecipient awards and their financial reports.



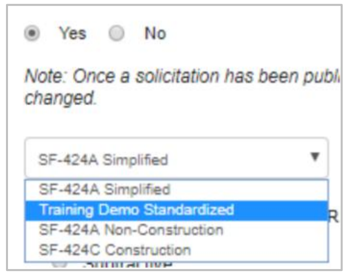

1. Fill in the required information (red asterisk) and any other necessary settings on the left side of this page.

    a. Accept Multiple Applications Per User: Select whether you want to allow applicants to submit more than one application on this program for multiple projects.

    b. Budget Development: Activate the Budget Development tool to select from two pre-built Budget Template worksheets or a custom-built template. This ensures standardized financial tracking of subrecipient awards according to specific cost categories. Without activation, applicants will only provide a total amount requested, making detailed budget tracking difficult.

    Select **Yes** if you will include Budget Development

i. If you have selected **Yes**, you will need to select the desired budget template that applicants will use to submit their budget proposals:




***Note:** Once a solicitation has been published, the Budget Development and Multiple Application settings will be locked from further editing.

c. Contract Number: Grants Network will autogenerate a contract number when each new award is made. If left with **No**, then each new award will leave the award contract number field blank for a custom value

d. Collect Detailed Financial Reports: This setting changes the financial report data collection method from category-specific spending reporting to itemized spending data based on prescribed ledger codes and descriptions that you provide to subrecipients. If left unselected, subrecipients can still upload detailed documents when submitting their financial reports.

e. Require Invoice Number on financial reports: Requires the Grants Network user to populate the invoice number field when approving an incoming financial report

f. Require Receiver ID on financial reports: Requires the Grants Network user to populate the invoice number field when approving an incoming financial report

g. Track program income with Finance Reports: This setting is not active for current implementations of the Grants Network system. Program income will be tracked as a separate item in the financial report.

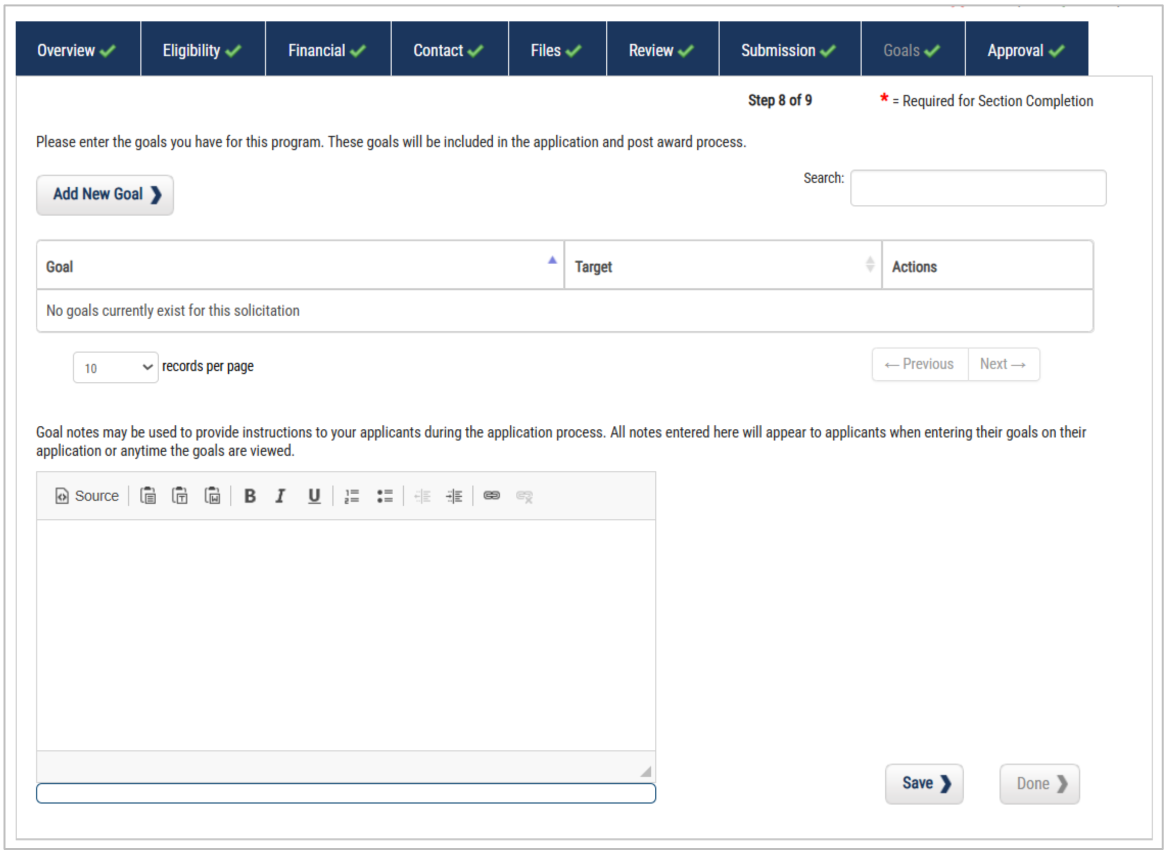
2. Click **Save**.
3. A Green Success Message will appear once this section has been completed, and a green checkmark will appear above the tab.

## Goals Tab

The Goals tab is an optional feature that lets you set specific metrics for subrecipients to track, aligning them with your program priorities and community impact goals. Applicants will enter their projected target amounts in provided fields.

If awarded, these projected amounts will appear in the activity report function, allowing subrecipients to report incremental activity each time they submit an activity report.

You can set the frequency and instructions for Activity Reports in the Activity Report setting under the Approval tab (covered in the next section).



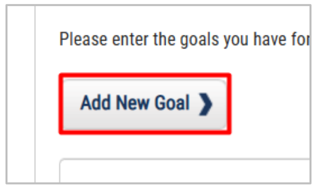

*Note: To see how these reports are completed by Subrecipients, visit the Submitting Reports to Your Grantor guide from the Grants Network Resource Center. (Location: Resource Center > Subrecipients: Post-Award Guides > Submitting Reports to Your Grantor)

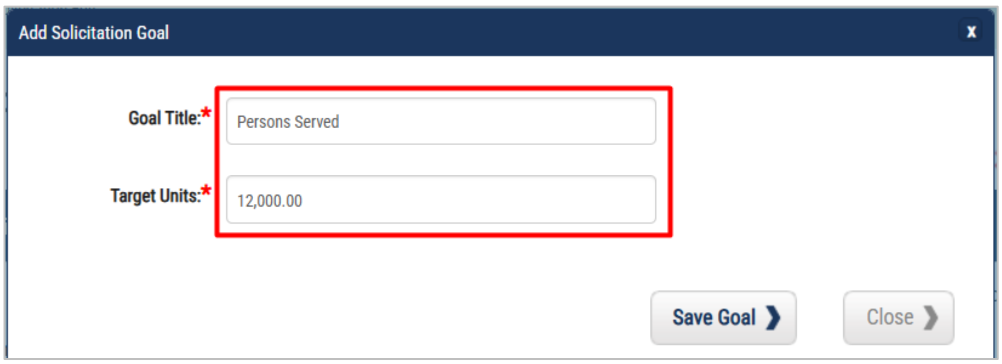
*Note: To see how the goal data is collected and displayed from all submitted reports, visit the Subrecipient Report Builder guide from the Grants Network Resource Center. (Location: Resource Center > Grantor: Post-Award Guides > Subrecipient Report Builder)

1. To create goals for this program, fill in the required information (red asterisk) and any other necessary information in the steps below.

a. Add New Goal: Create one or more goal titles for applicants and future subrecipients to track. Specify your internal target amount in the Target Units field, which you aim to achieve through subrecipients' project activities (even if the value is zero). The Target Units field will NOT be visible to applicants and subrecipients.

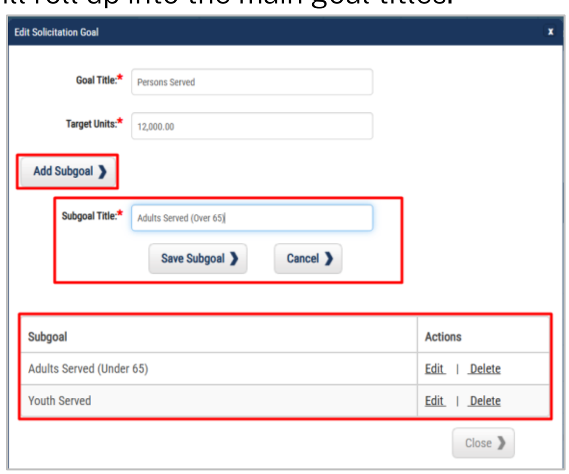
*Note: Applicants are not required to enter amounts in all goal fields; they will fill in those relevant to their planned project activities.



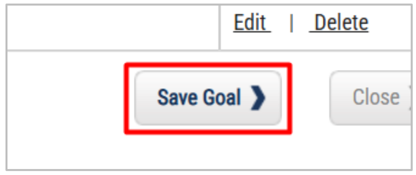




i. Click **Save Goal**

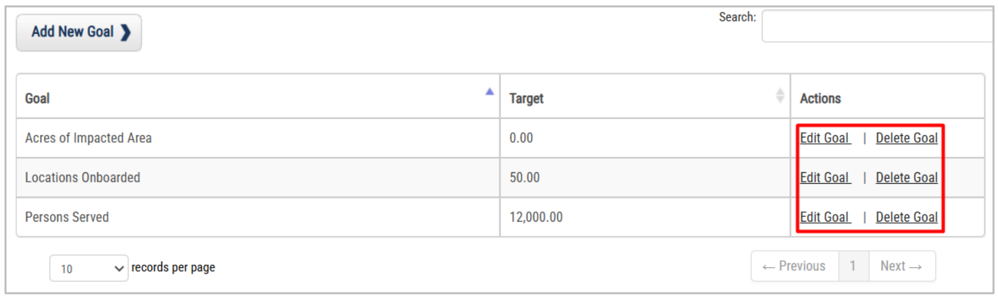
1. To create specific goals that add up to a combined goal, create Subgoals. After you click **Save Subgoal** these will be listed below for you to edit as needed. Applicants and subrecipients will be able to fill in the relevant Subgoals, and the aggregate amounts will roll up into the main goal titles.



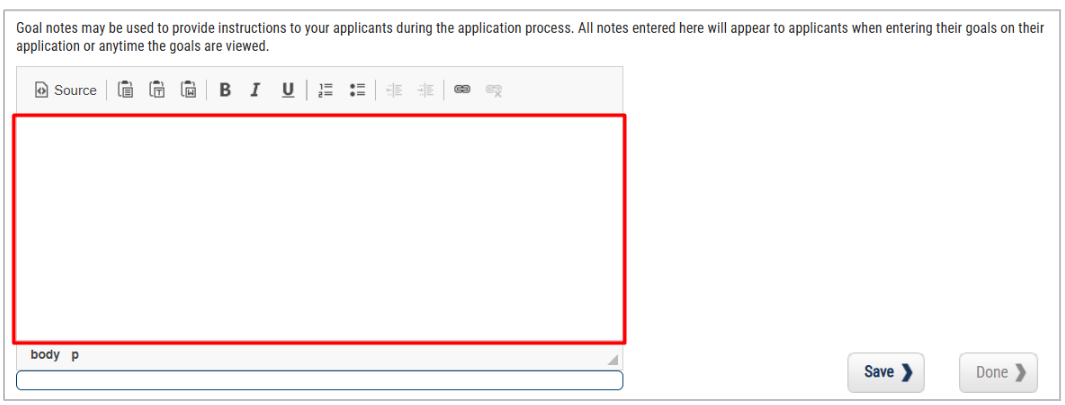
ii. Click **Save Goal** again to return to the Goals Tab




iii. You may edit or remove goals until they are used by applicants and subrecipients to store data:




b. Goal Notes: Goal notes may be used to provide instructions to your applicants during the application process. All notes entered here will appear to applicants when entering their goals on their application or anytime the goals are viewed.

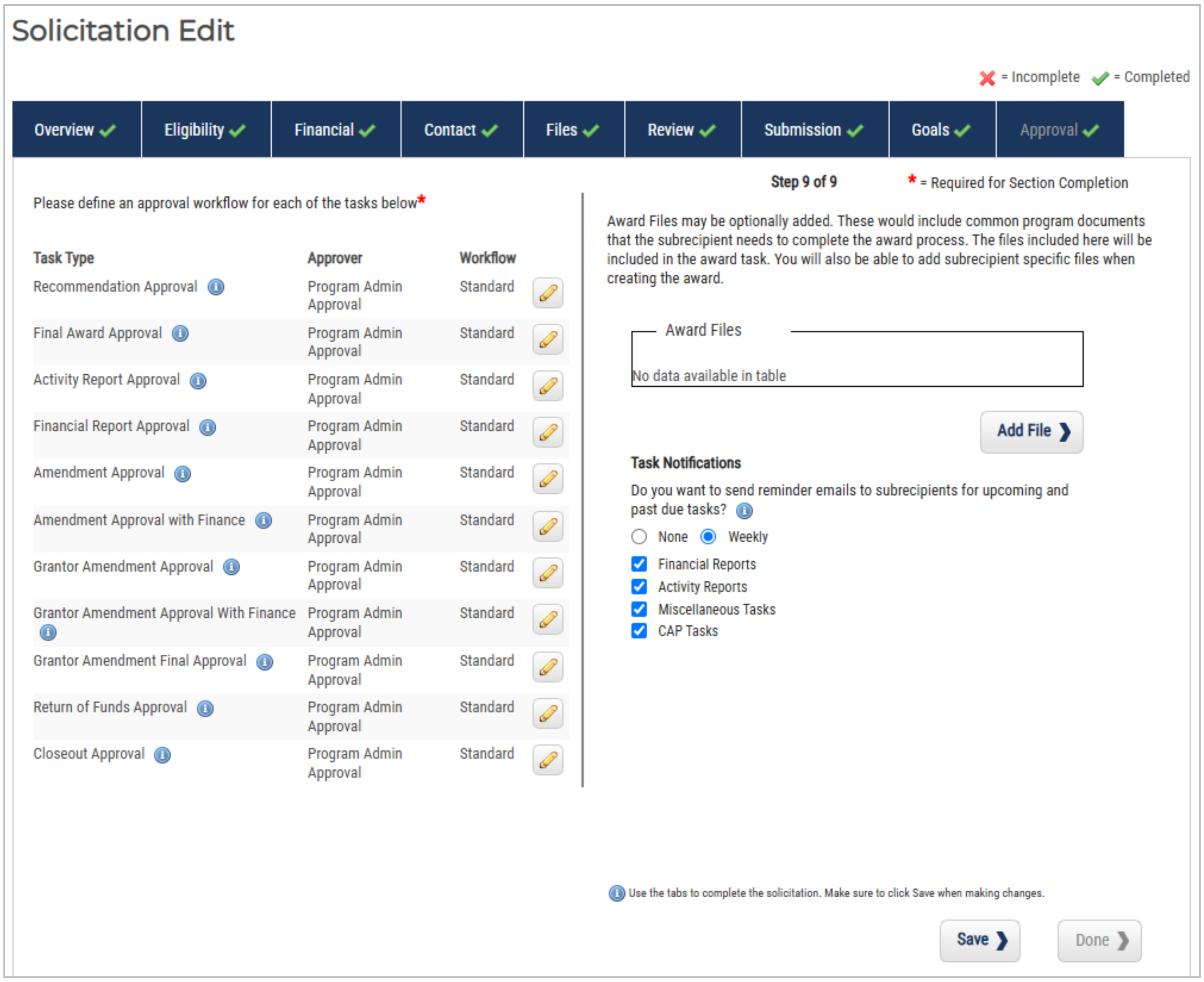



2. Click **Save** button.

3. A Green Success Message will appear once this section has been completed, and a green checkmark will appear above the tab.

## Approval Tab

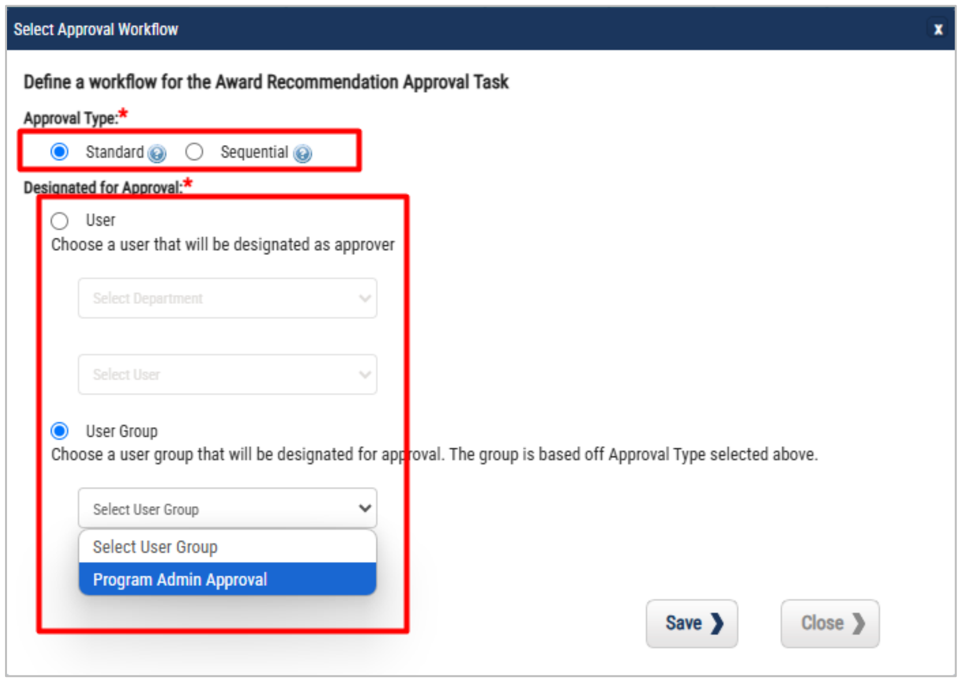
The Approval Tab is where you will set workflows for all the required approval processes after an applicant is recommended for an award or awarded. It also has a section for default files in each award package and allows toggling notifications to subrecipients about reports or tasks due.




1. Fill in the required information (red asterisk) and any other necessary information.
    i. Approval Workflows: For each approval task type, you must click the pencil icon and set an approver or group of approvers. Some Task Types (i.e. Activity Report Approval, Financial Report Approval, and Closeout Approval) will include other settings unique to that Task Type.

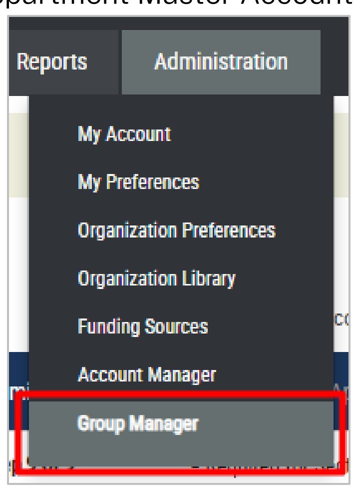
ii. Select **Standard** or **Sequential** for the Approval Type. Then, select the User or User Group that will approve this Task Type.

1. Standard: Standard approvals require an approval by an assigned approver or member of an approval group. In a group, any member can approve.
2. Sequential: Sequential approvals are those that require each approval group member to approve in a specific order, one after another.

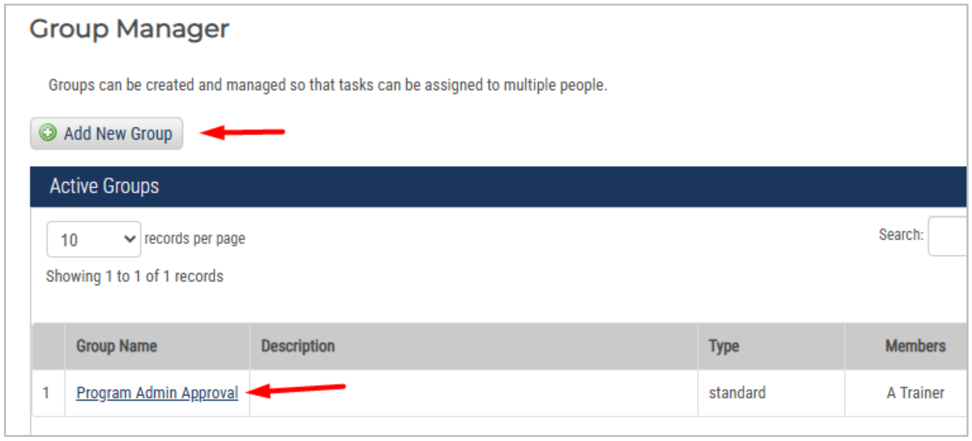



3. Click **Save**

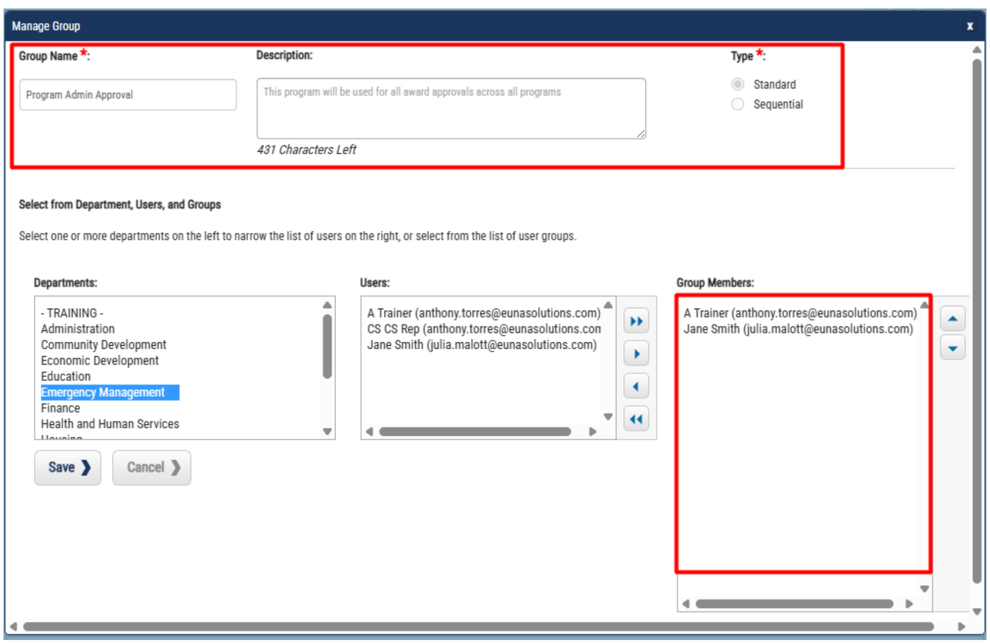
   ***Note:** Groups are created in the Administration > Group Manager settings by Organization Master Account Holders (OMAH) and Department Master Account Holders (DMAH)



Click **Add New Group** to create a new group or click on an existing group to edit its members.




Set the group's name, description, approval type, and then select & arrange its members.




iii. Task Type explanations:

1. Recommendation Approval: This approval workflow is triggered when an award recommendation has been created. It occurs before the user is notified of their award offer.

2. Final Award Approval: This approval workflow is triggered when an award has been accepted by an applicant. This is the final approval before the award is considered awarded.

3. Activity Report Approval: This approval workflow is triggered when an activity report has been submitted by a subrecipient.

   *Note: Additional options included. You can set a default frequency for this task (e.g. every 3 months on the last day of the month). You can also write instructions for the subrecipient filling out this report.

4. Financial Report Approval: This approval workflow is triggered when a financial report has been submitted by a subrecipient.

   *Note: Additional options included. You can set a default frequency for this task (e.g. every 3 months on the last day of the month). Additionally, you can write instructions for the subrecipient to complete this report and include an acknowledgment statement to display as a warning message upon submission.

5. Amendment Approval: This approval workflow is triggered when a user requests a grant amendment. If selected, this workflow can also be used for financial amendments without changes to the award amount.

   *Note: Additional options included. If the subrecipient's amendment included financial changes that do NOT change the award amount (e.g. re-allocating amounts between budget categories), you will see a checkbox in this Task Type to route those amendment requests through this approval workflow.

6. Amendment Approval with Finance: This approval workflow is triggered when a user requests a grant amendment with Finance.

7. Grantor Amendment Approval: This approval workflow is triggered when a grantor requests a grant amendment and needs internal approval.

8. Grantor Amendment Approval with Finance: This approval workflow is triggered when a grantor requests a grant amendment with financial and needs internal approval.

9. Grantor Amendment Final Approval: This approval workflow is triggered when final approval is needed by a subrecipient on a grantor-created grant amendment.

10. Return of Funds Approval: This workflow is triggered when a Grantor records a return of funds for a subrecipient.

11. Closeout Approval: This approval workflow is triggered when the closeout process is triggered by a subrecipient.

    ***Note:** Additional options included. You can include an acknowledgment statement to display as a warning message upon submission.

iv. Once you have filled out all Approval Workflows, you can save the Approval Tab. These can be updated at any time before or after publishing the program and managing awards.

b. Award Files: The files included here will be included in the award task. You will also be able to add subrecipient specific files when creating the award. Examples include common program documents that the subrecipient needs to complete the award process.

c. Task Notifications: Select which reminder emails to send to subrecipients for upcoming and past due tasks.

2. Click **Save**.

3. A Green Success Message will appear once this section has been completed, and a green checkmark will appear above the tab.

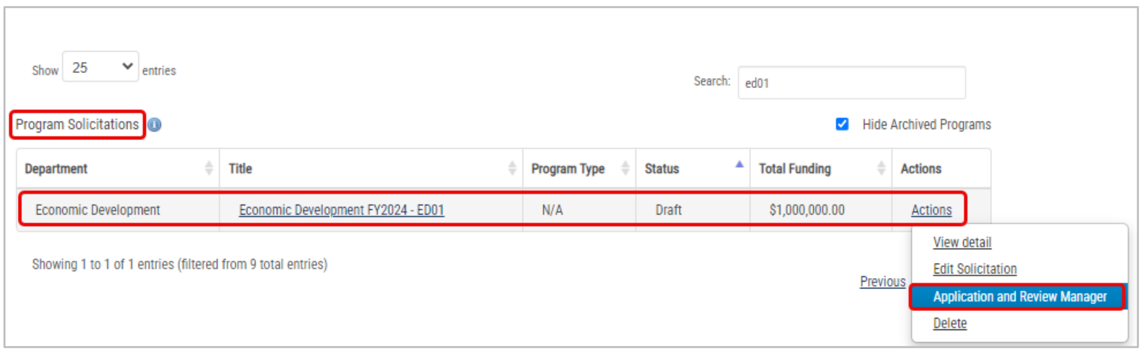
# Application Setup

## Accessing Application & Review Manager

There are two ways you can access the Application & Review Manager as seen below:

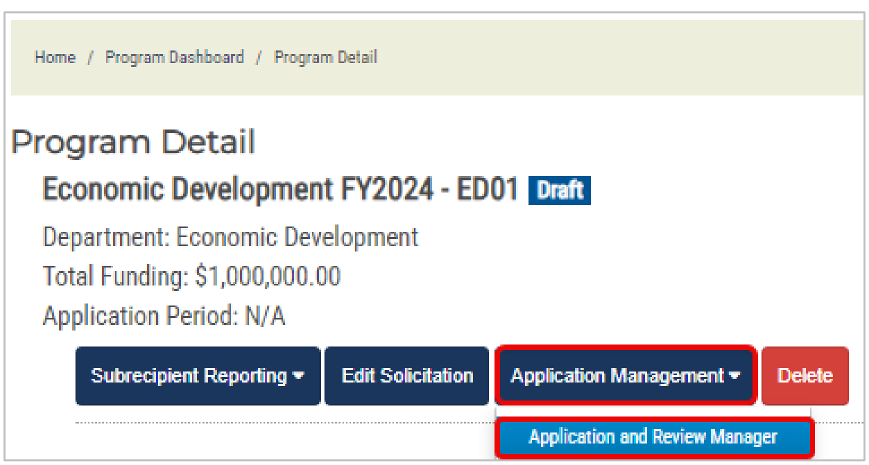
Grant Management Tab > Subrecipient Management > Program Dashboard > Program Solicitations > Actions > Application and Review Manager

1. The first way to access the Application and Review Manager is through the Program Dashboard Page (only if an application is in the Draft Status as seen below).



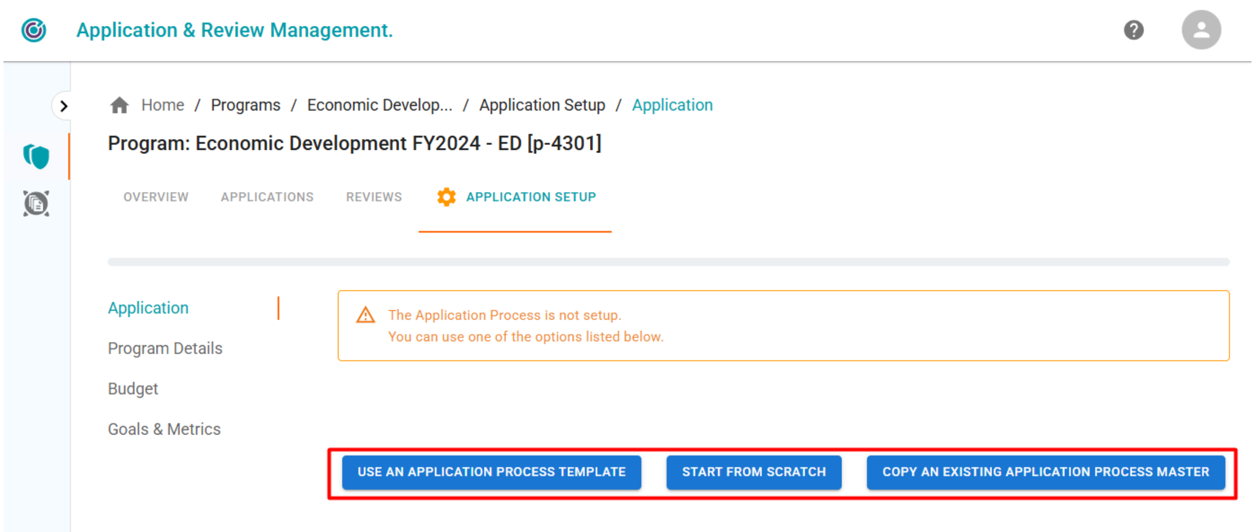

Grant Management Tab > Subrecipient Management > Program Dashboard > Program Solicitations > Program Detail Page > Application & Review Manager Button

2. The second way is by clicking on the **Application Management** button from the Program Detail Page. You will then select **Application and Review Manager**.

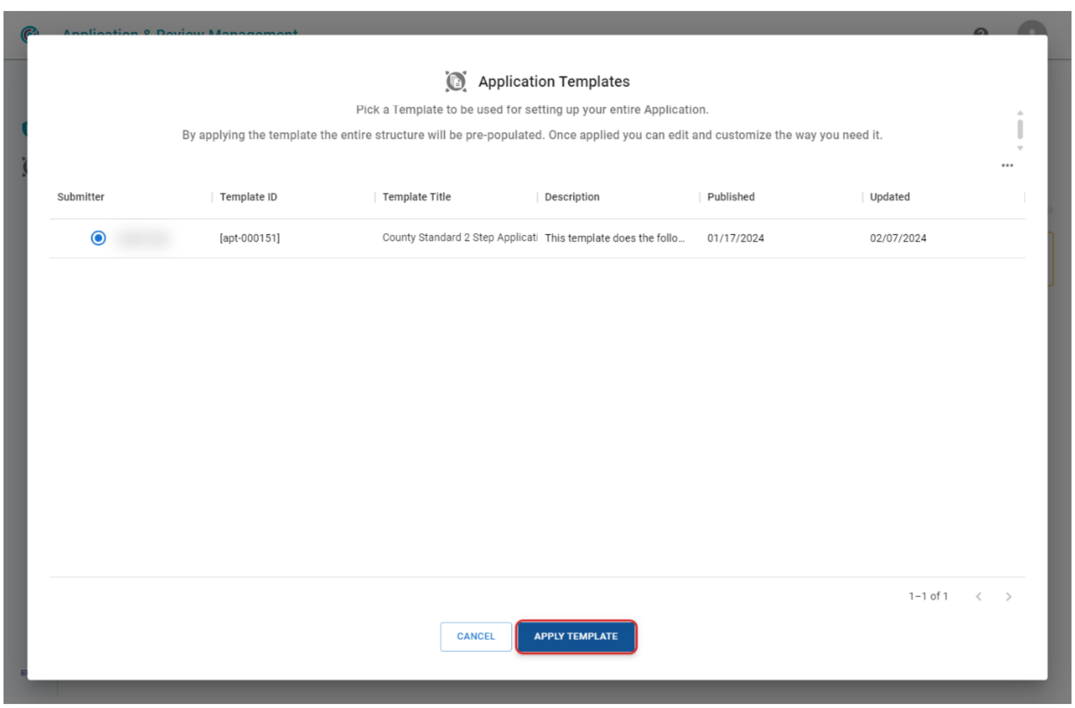


## Selecting the Application Setup Method

You will begin by selecting whether you will use another Application Process stored in your system or **Start From Scratch**. The three options will behave as follows:




1. Use an Application Process Template – Select from any Application Process Templates that you have built within the Templates page [See Appendix C for instructions on creating and managing Templates]. The stages, forms, and all other details from that template will copy into your program and allow you to continue editing for this specific program.



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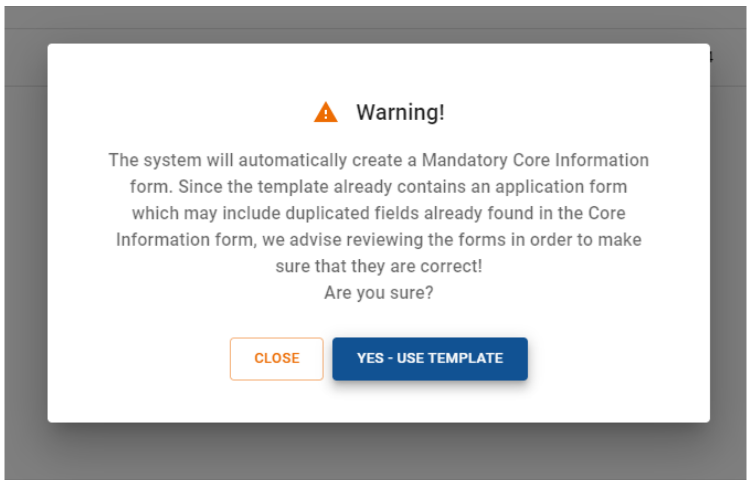
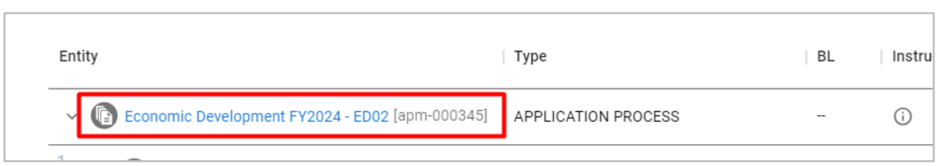
i. Click **Apply Template**

ii. A notice will appear to let you know that a Core Information Form will be automatically created and inserted into your earliest submission stage as the first form. It is recommended that you take into consideration any overlap between the questions created in your template forms and the questions in the Core Information Form.

iii. Click **Yes – Use Template** to continue onto editing and refining the process




iv. Click the name of the Application Process to access the edit options including its start and end date, instructions, etc. (Continue to the next section for further instructions)

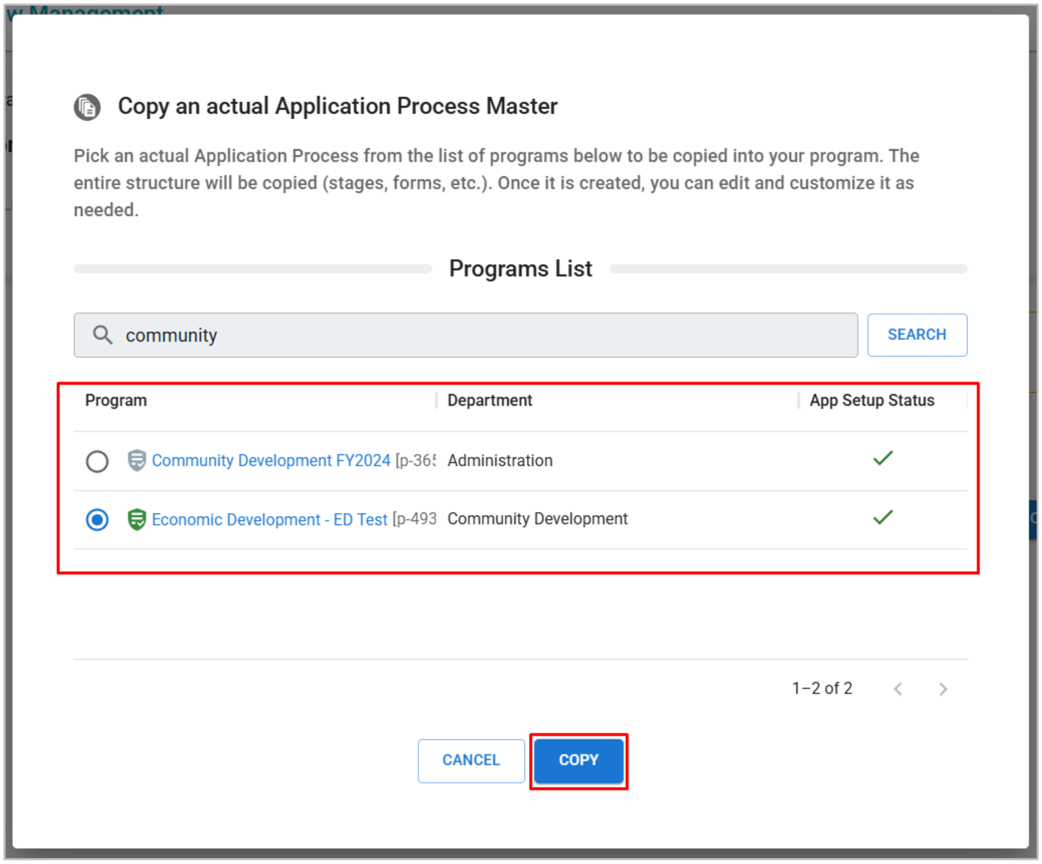



2. Start From Scratch - This will create a blank Application Process where you will begin filling the required elements.

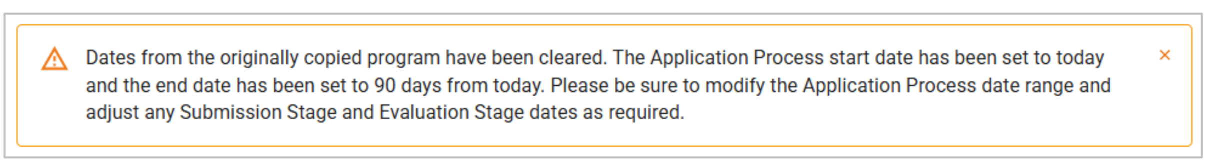
   ***Note:** [Continue to the Application Process section below to see how the process is set up from scratch]

3. Copy an Existing Application Process Master – Select a Program within your Organization's account to copy its Application Process. The entire structure will be

copied (stages, forms, etc.). Once it is created, you can edit and customize it as needed.



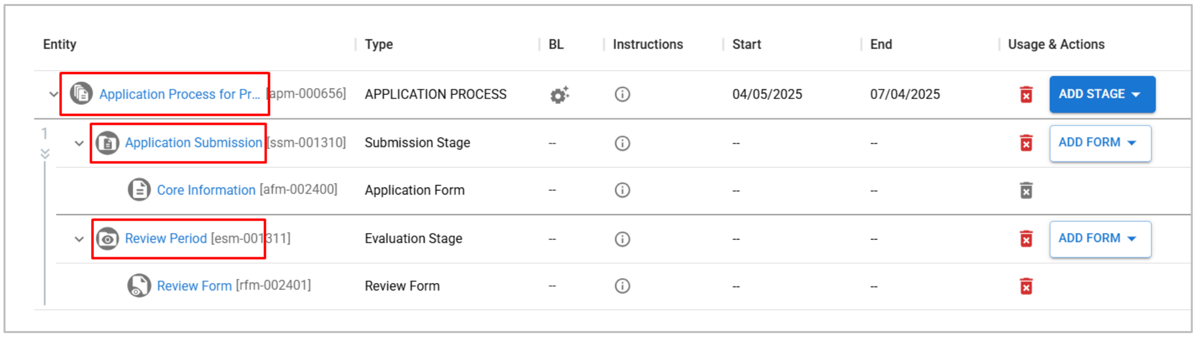

***Note:** The following message will appear at the top of the Application Setup page. This indicates that all date ranges are empty (leaving the periods open indefinitely) and can be edited to specific dates.




a. Click the Application Process and/or Stage names to open the edit options for Start and End Dates as well as Instruction Boxes, form fields, etc.

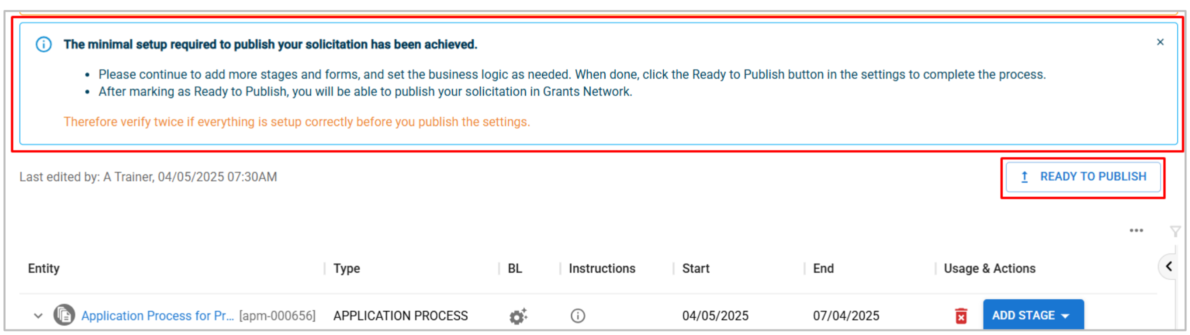
   ***Note:** When setting Application Process dates, ensure the date range includes all Submission and Evaluation Stages. The start date should precede the first Submission Stage, and the end date should follow the last Evaluation Stage.

***Note:** If you edit any application form content, remember to open each subsequent Evaluation stage and select the necessary application fields in the "Set Content to Review" section




b. Once finished with edits, and once the foundational stages have been set with their required elements, you click the **Ready to Publish** button and continue to the Subrecipient Management dashboard or Program Detail page to Publish your program.

***Note:** If you do not see the below message, check that you have created one Evaluation Stage for each Submission Stage and check the instructions, form fields, and "Set Content To Review" sections for blank or incomplete information. The message reads: "The minimal setup required to publish your solicitation has been achieved"



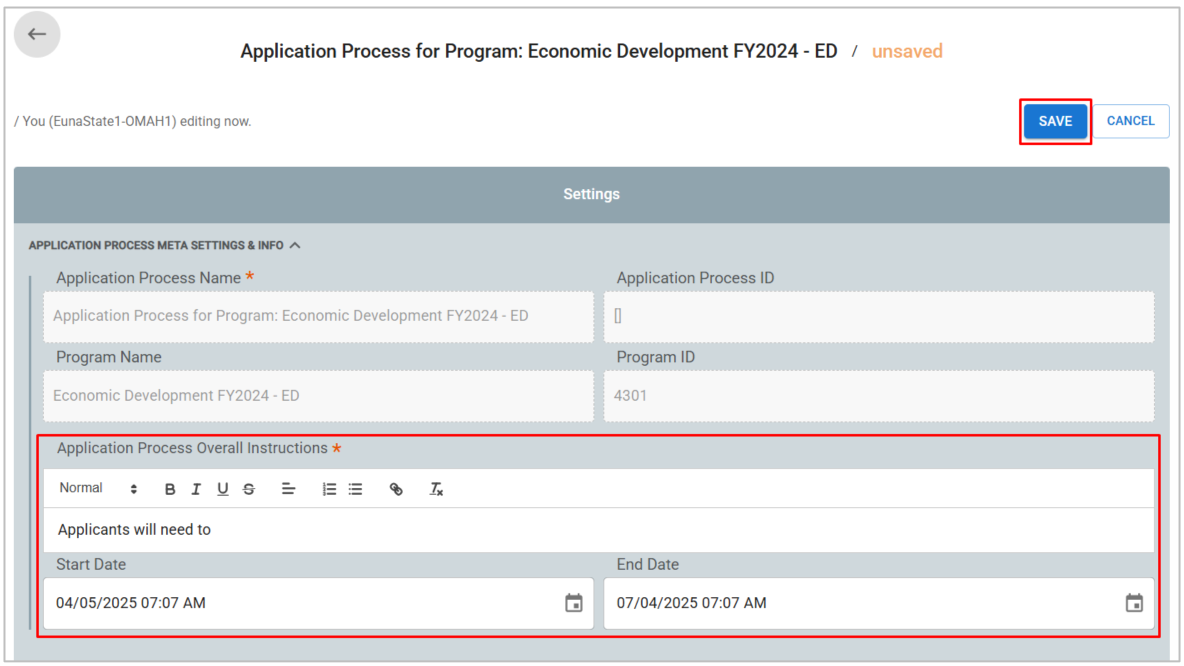
## Application Process

1. Complete the required fields or edit if using a Template for the following:
    1. Application Process Overall Instructions
    2. Start Date (The default setting is the current date)
    3. End Date (The default setting is 90 days from the current date)

       ***Note:** When setting Application Process dates, ensure the date range includes all Submission and Evaluation Stages. The start date should precede the first Submission Stage, and the end date should follow the last Evaluation Stage.

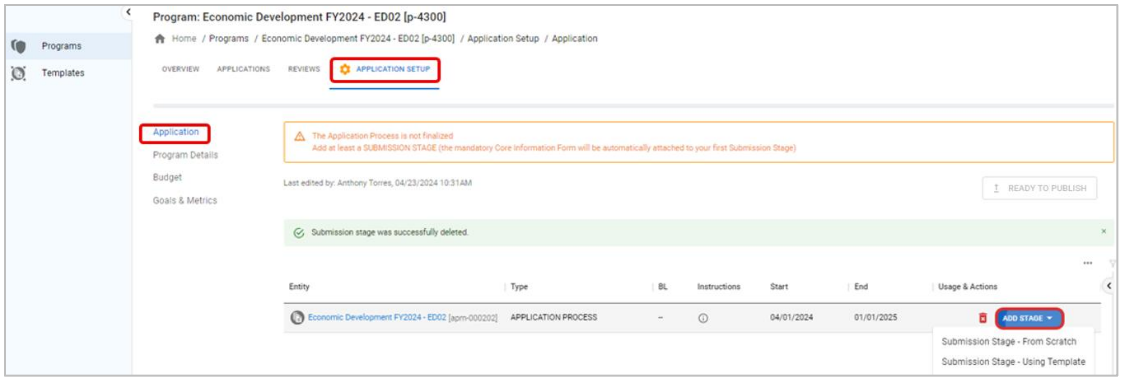
       ***Note:** The time zone for time-of-day settings will automatically detect and display your local time.

    4. Click the **Save** button on right hand top corner

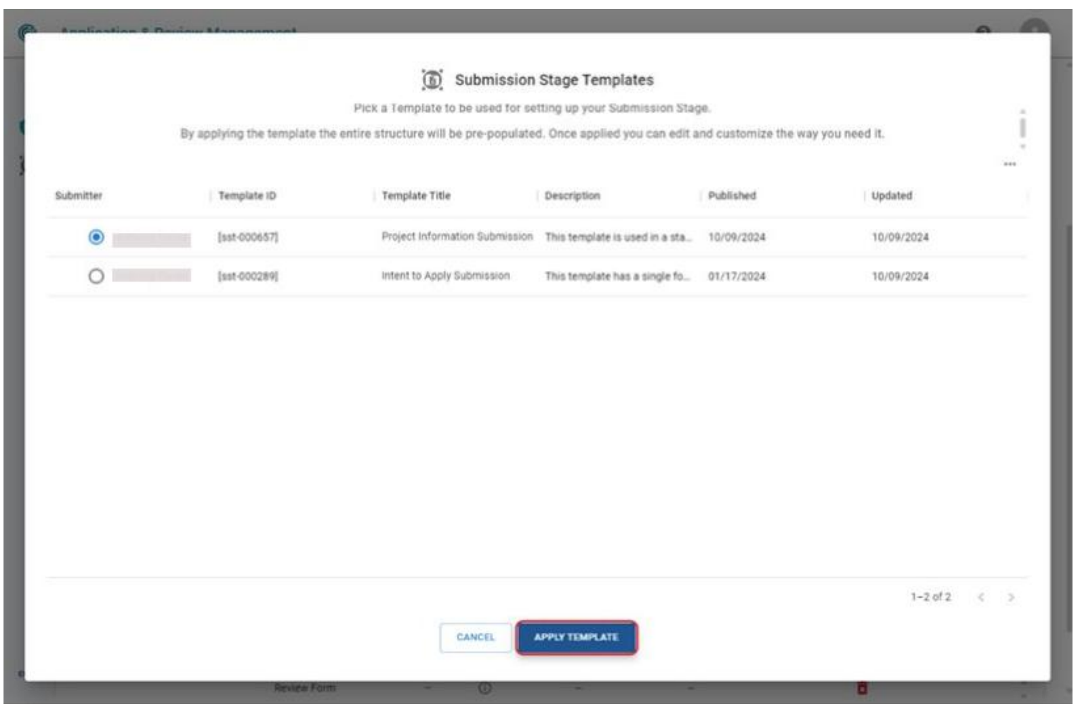


## Submission Stage

1. Click **Add Stage**
2. Add a Submission Stage and select **From Scratch** or **Using Template**



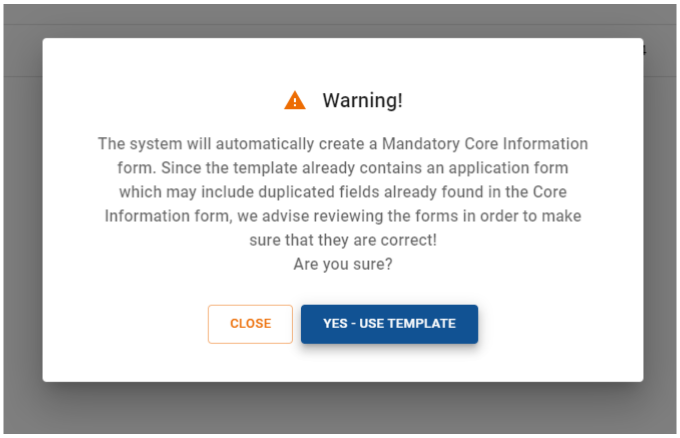

a. Clicking the Template option will open a window to select from any Submission Stage Templates that you have built within the Templates page [See Appendix C for further instructions on creating and managing Templates].



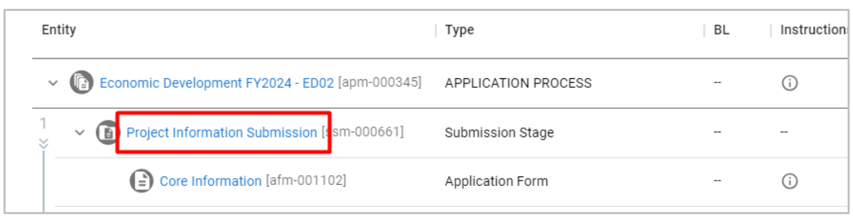

i. Click **Apply Template**

ii. A notice will appear to let you know that a Core Information Form will be automatically created and inserted into your submission stage as the first form. It is recommended that you take into consideration any overlap between the questions created in your template forms and the questions in the Core Information Form.

Click **Yes – Use Template** to continue onto editing and refining the Submission Stage




iii. Click the name of the Submission Stage or its Forms to access the edit options including its Start and End Date, instructions, etc. (Continue to the next section for further instructions)




b. If selecting the **From Scratch** option, continue for edit instructions.

3. Complete the following fields:

   a. Stage Name
   b. Instructions (Displayed to Applicants when opening this Submission Stage.)
   c. Start Date
   d. End Date

   *Note: If left unspecified, Start and End Dates will default to the date range of the Program's entire Application Process.

   *Note: The time zone for time-of-day settings will automatically detect and display your local time.

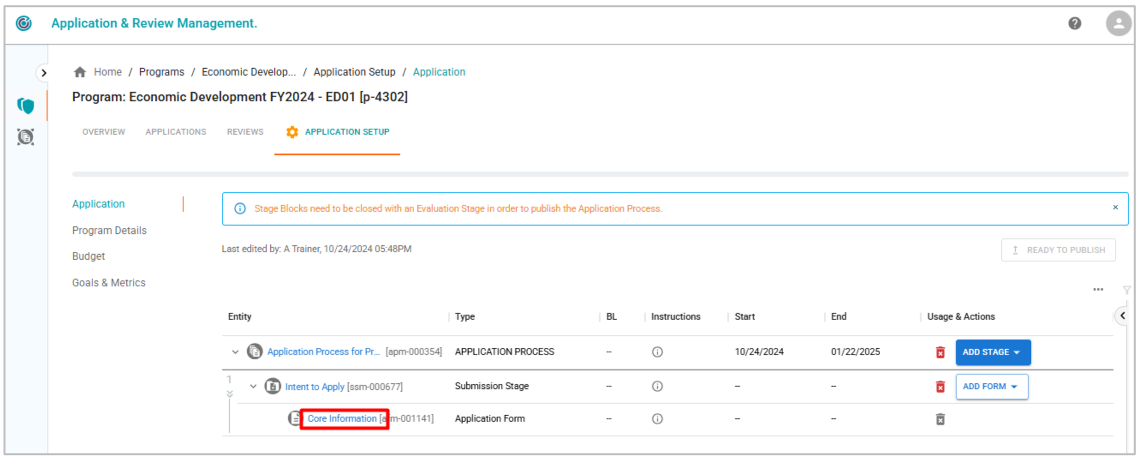
   e. Click **Save** on right hand top corner

## Application Form

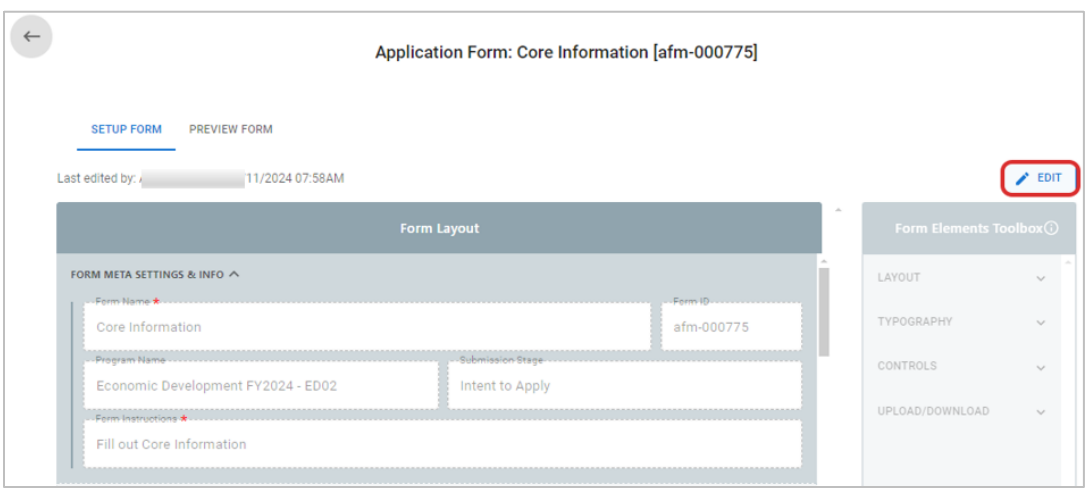
1. A mandatory Application Form will appear with the title **Core Information.** This form contains the mandatory Project Title and Organization Name fields that will populate the award details if selected for an Award Recommendation. It also contains standard organization and contact information fields.

   ***Note:** If using a Submission Stage Template, the standard Core Information Form will be inserted into your Submission Stage automatically as the first form. If you have multiple Submission Stages, it will appear on the first Submission Stage.

2. Click on the **Core Information Form** to edit form fields.



3. Click **Edit.**





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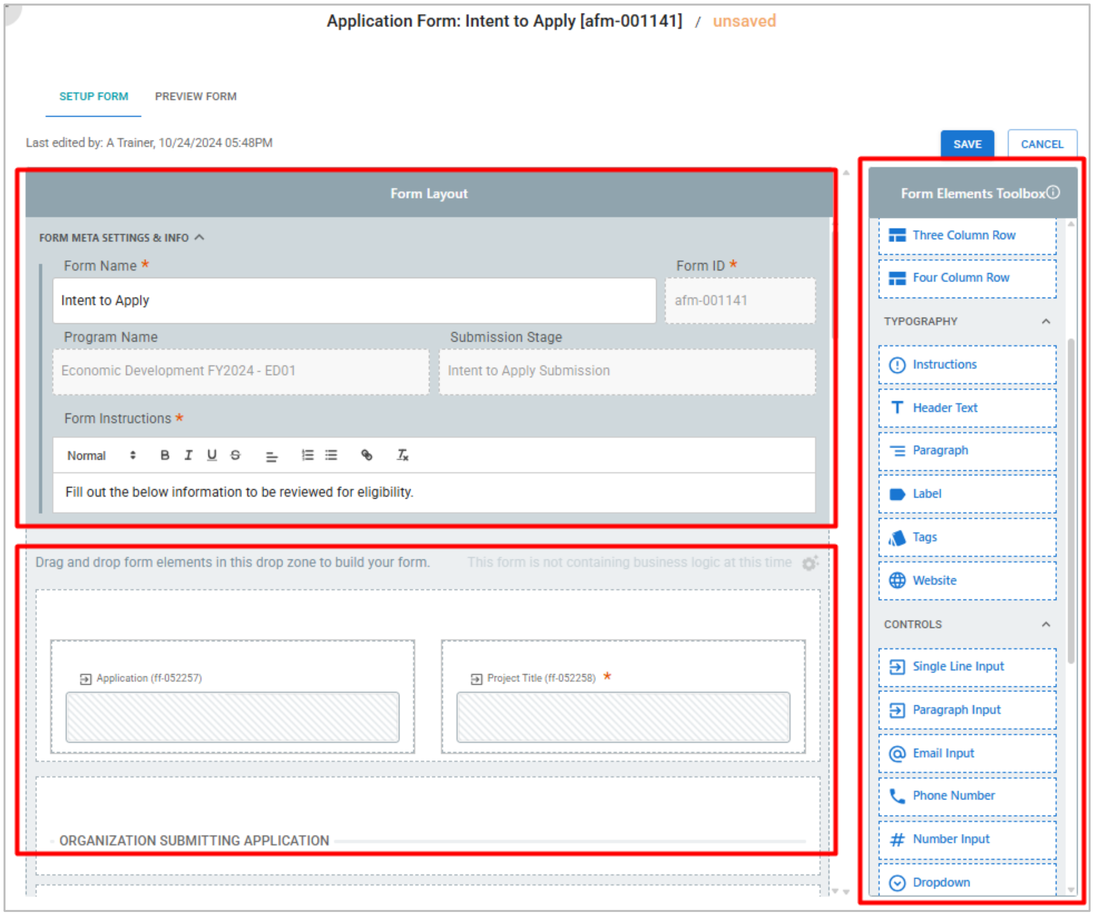
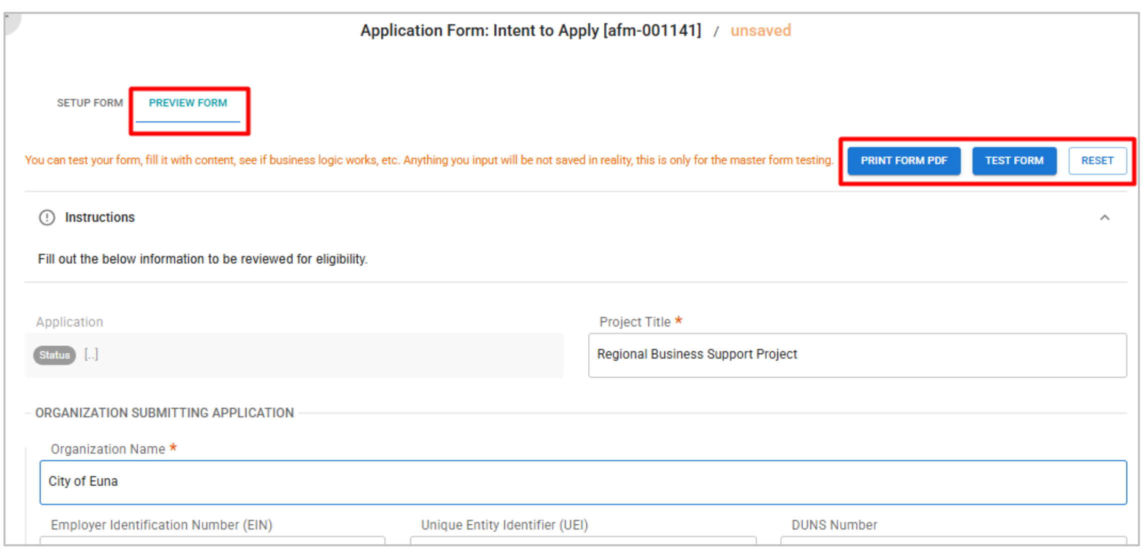
4. Add new fields by dragging a Form Element from the **Form Elements Toolbox** on the right-hand panel. (See Appendix A and B for more details.)

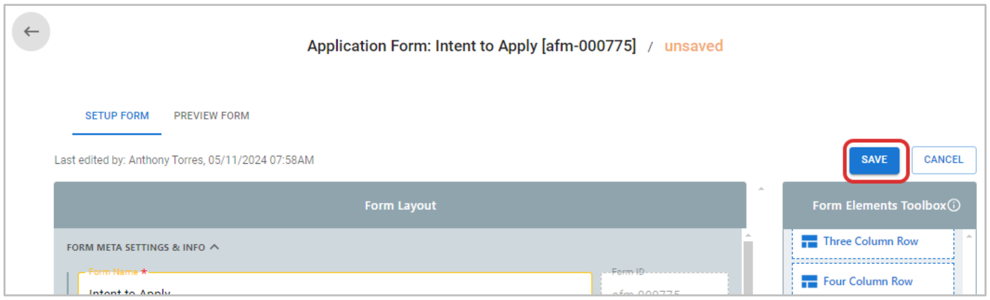


5. Click **Preview Form** to preview and test the form from the Applicant point of view.

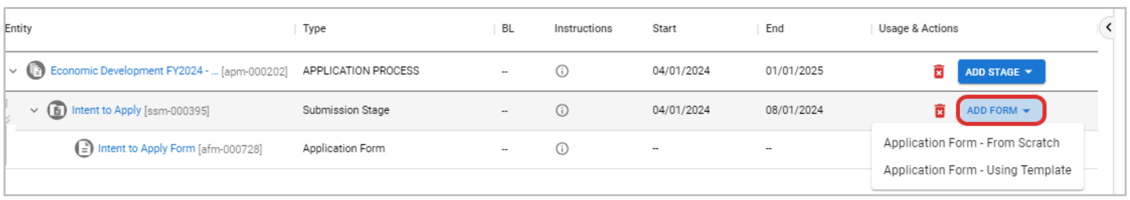


a. Click **Test Form** to test the save action and check for any warning messages that should appear if required fields have been missed.
b. Click **Reset** to empty the data you have entered into these fields.
c. Click **Print Form PDF** to export a PDF copy of this form without any data.

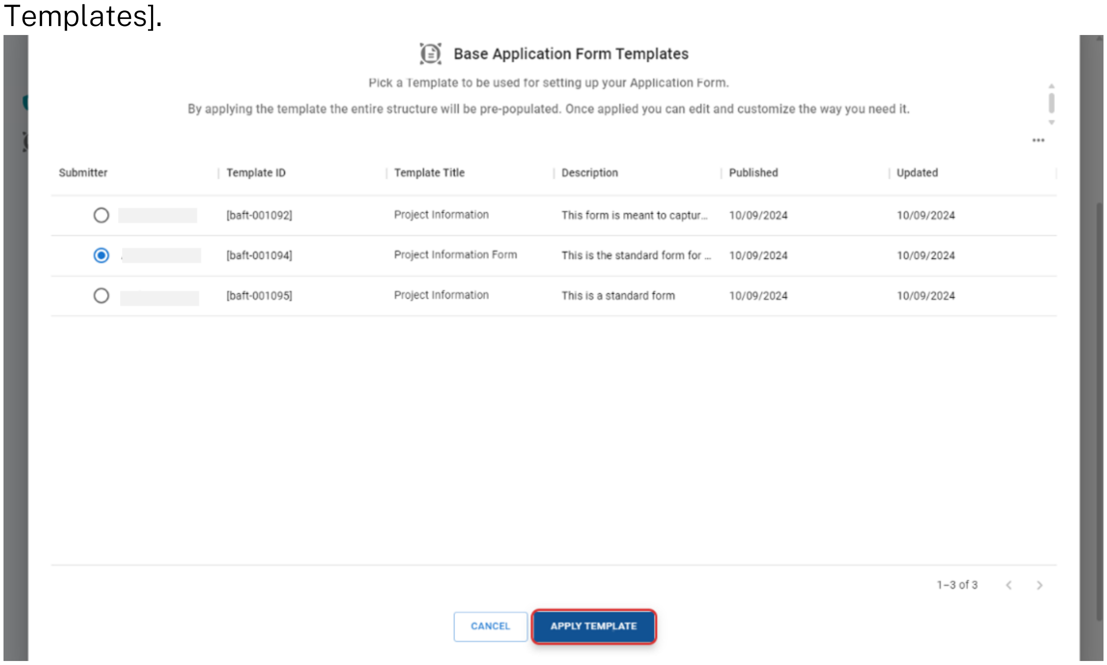
6. Click **Save** when done editing the form.




7. If additional forms are needed in this Submission Stage, click **Add Form**, and select **From Scratch** or **Using Template**




a. Clicking the Template option will open a window to select from any Application Form Templates that you have built within the Templates page [See Appendix C for further instructions on creating and managing Templates].



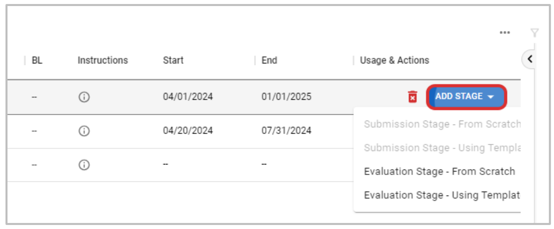
i. Click **Apply Template**

ii. Click the name of the Form to access the edit options (Continue to the next section for further instructions)

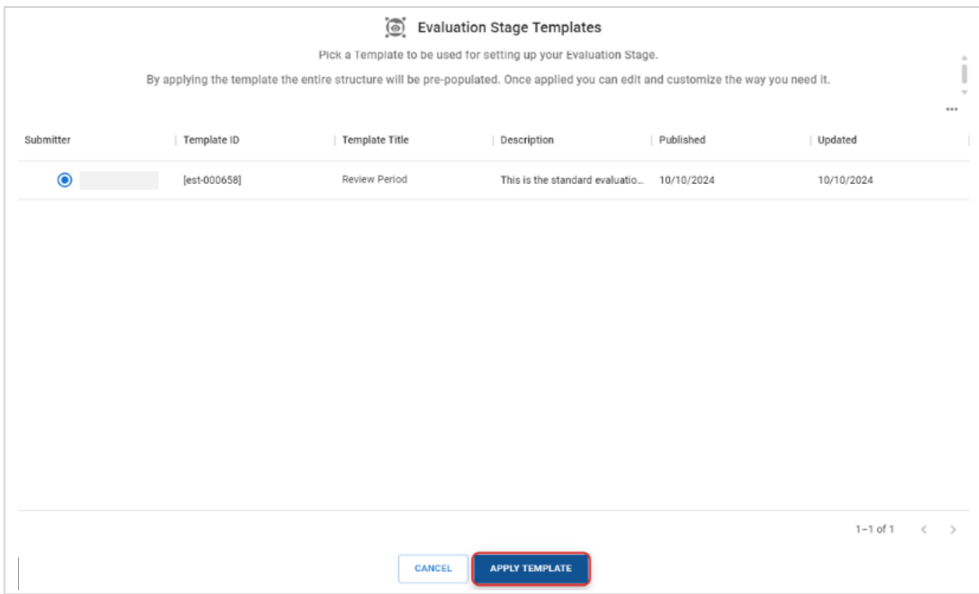

***Note:** If you would like to copy an application form from another program into this program, you may do so by copying the existing form into the Templates section. That Application Form Template can then be used in this and other new programs. (See the "Copying Existing Forms to Form Templates" section in Appendix C for more information.)

## Evaluation Stage

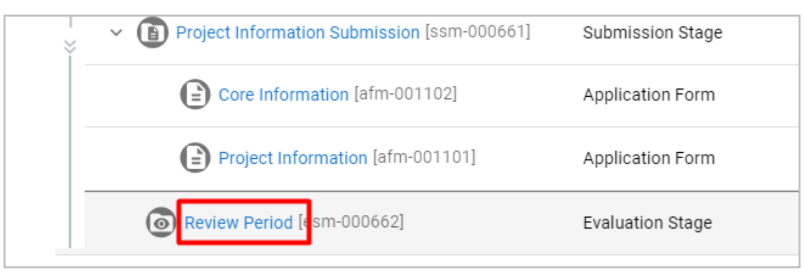
1. Click **Add Stage**
2. Add an Evaluation Stage and select **From Scratch** or **Using Template**




   a. Clicking the Template option will open a window to select from any Evaluation Stage Templates that you have built within the Templates page [See Appendix C for instructions on creating and managing Templates].




      i. Click **Apply Template** to continue onto editing and refining the Evaluation Stage
      ii. Click the name of the Evaluation Stage to access the edit options including its Start and End Date, instructions, etc. (Continue to the next section for further instructions)



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b. If selecting the **From Scratch** option, continue for edit instructions.

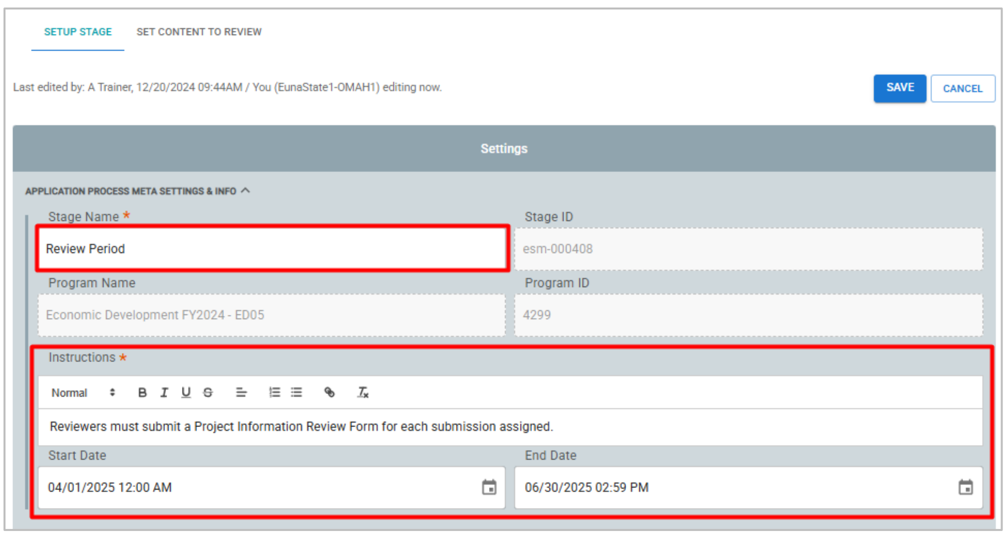
3. Complete the following fields:

   a. Stage Name
   b. Instructions (This will be displayed to the Reviewers when opening this Evaluation Stage)
   c. Start Date
   d. End Date

   *__Note:__ If left unspecified, Start and End Dates will default to the date range of the Program's entire Application Process.

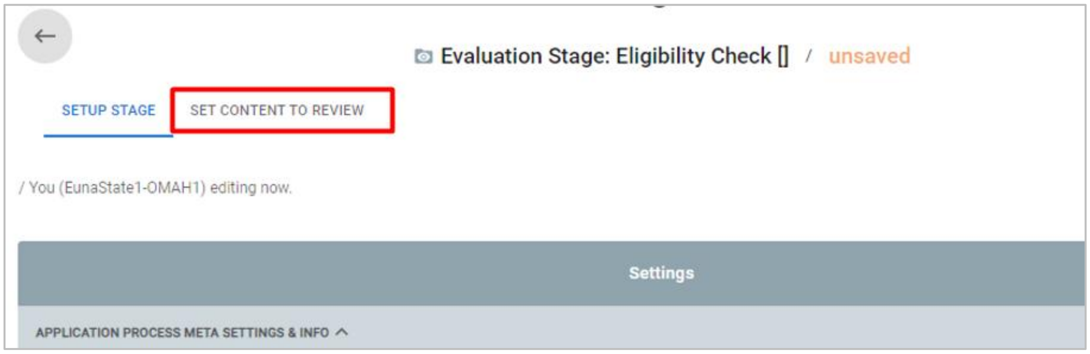
   *__Note:__ The time zone for time-of-day settings will automatically detect and display your local time.

   e. Click **Save**

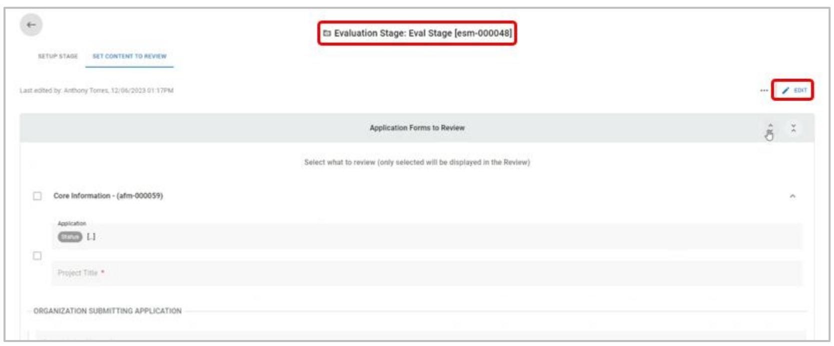


## Set Content to Review

1. Before leaving the Evaluation Stage settings, open the **Set Content to Review** tab at the top of the page. This will set the Application Content that will be visible to Reviewers.

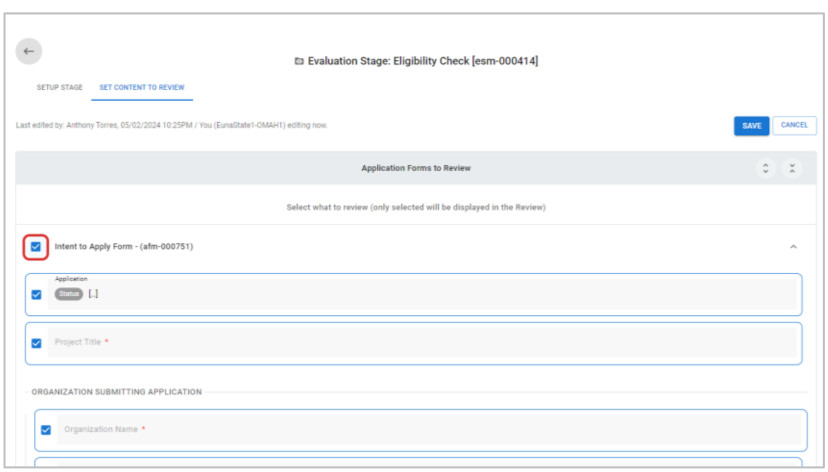



2. Click **Edit**

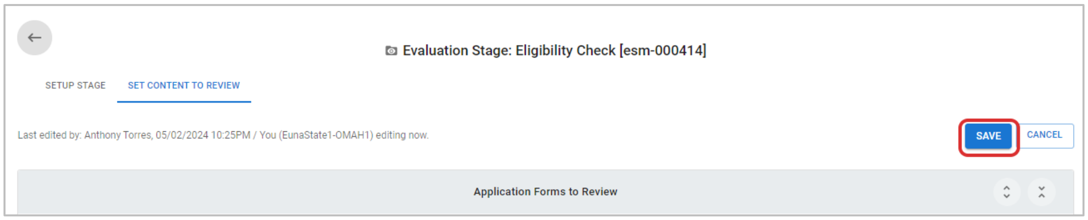



3. Select the checkbox next to any Application Form fields that you wish to include for Reviewers during this Evaluation Stage.

   ***Note:** If you wish to select all fields within that Application Form, select the top checkbox beside the name of that form.

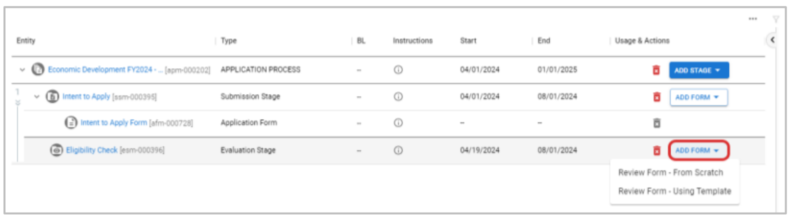


4. Click **Save**

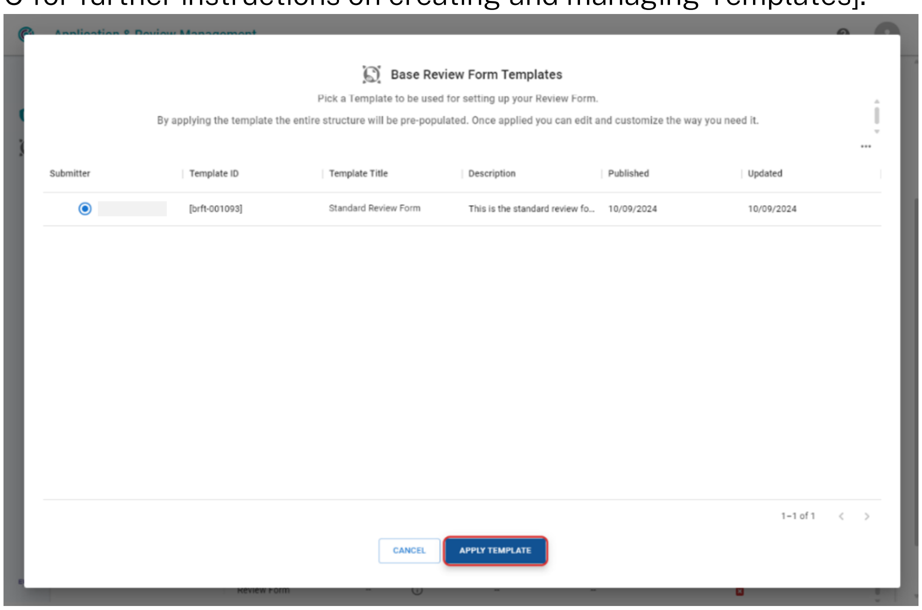



## Review Form

1. Once you have set the Content to Review within your Evaluation Stage, add a Review Form.
2. Click **Add Form** and select **From Scratch** or **Using Template**




a. Clicking the Template option will open a window to select from any Review Form Templates that you have built within the Templates page [See Appendix C for further instructions on creating and managing Templates].

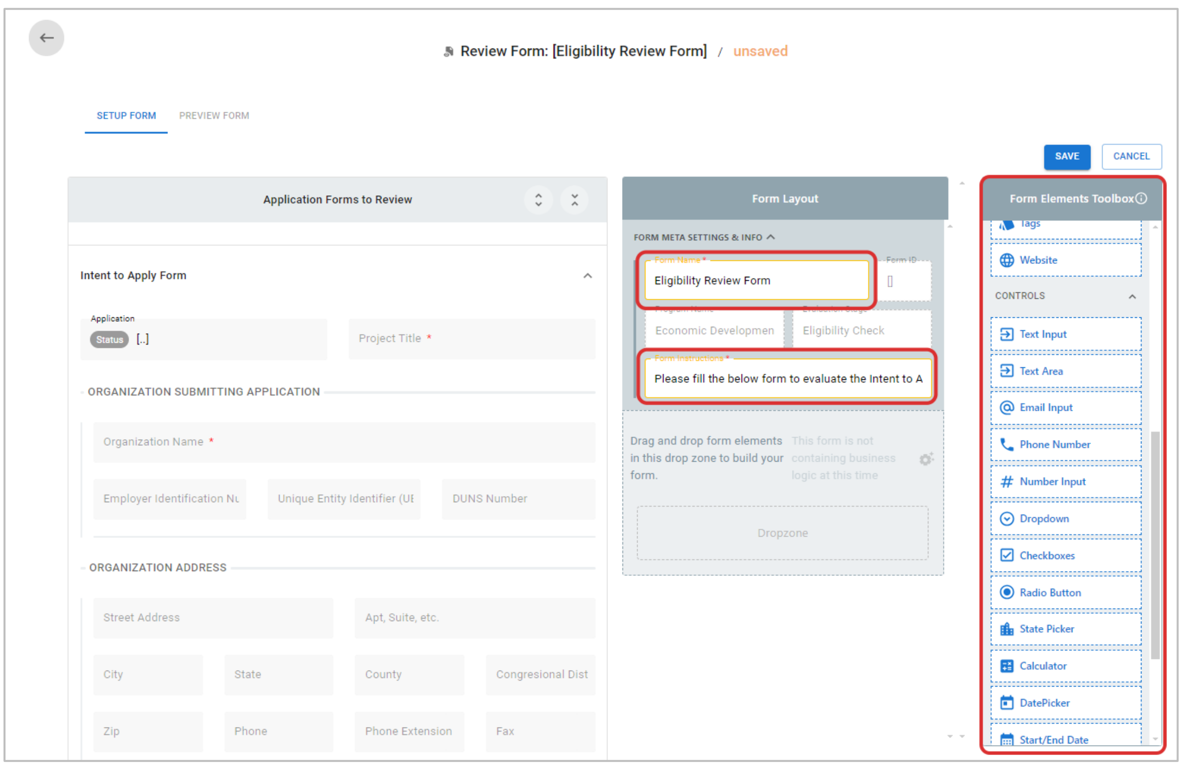



iii. Click **Apply Template**

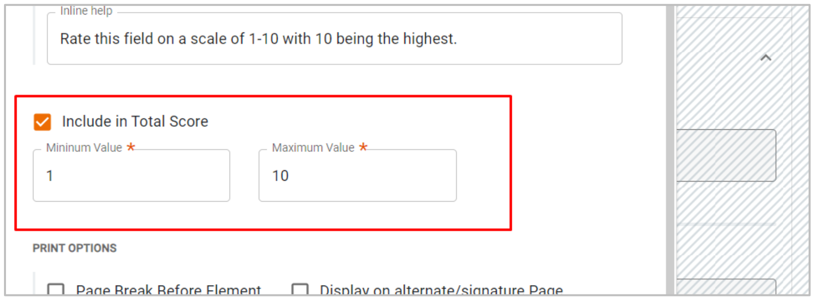
iv. Click the name of the Form to access the edit options (Continue to the next section for further instructions)

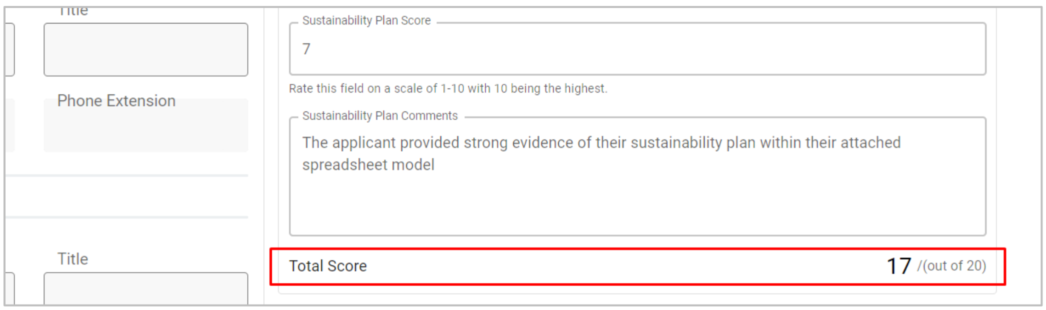

***Note:** If you would like to copy an application form from another program into this program, you may do so by copying the existing form into the Templates section. That Application Form Template can then be used in this and other new programs. (See the "Copying Existing Forms to Form Templates" section in Appendix C for more information.)

3. Fill the Form Name, Form Description, and Add new fields by dragging a Form Element from the Form Elements Toolbox on the right-hand panel (See Appendix A and B for more details).



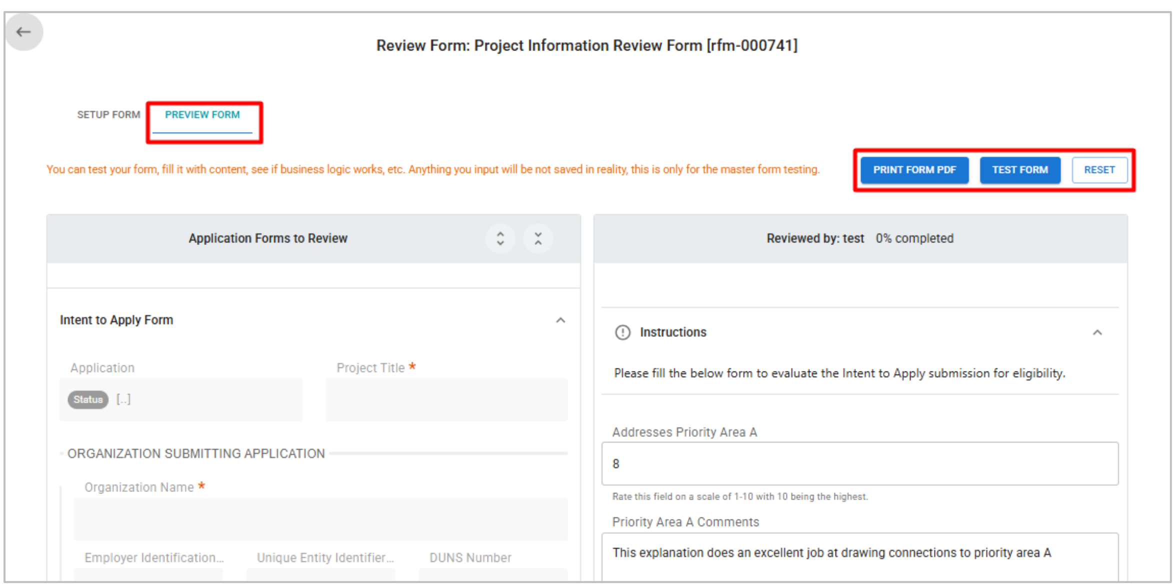
*Note: Review Forms come with a calculated **Total Score** display at the bottom of the form. While building and editing fields, you can flag any scoring fields (must be numbers) as a value to **Include in Total Score**. [See Appendix A for more information]



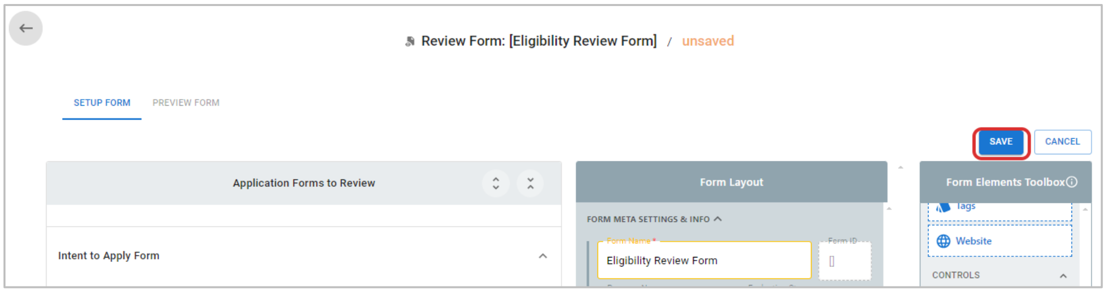




4. Click **Preview Form** to preview and test the form from the Reviewer point of view.

    a. Click **Test Form** to test the save action and check for any warning messages that should appear if required fields have been missed.
    b. Click **Reset** to empty the data you have entered into these fields.
    c. Click **Print Form PDF** to export a PDF copy of this form without any data.



5. Click **Save** when finished editing.



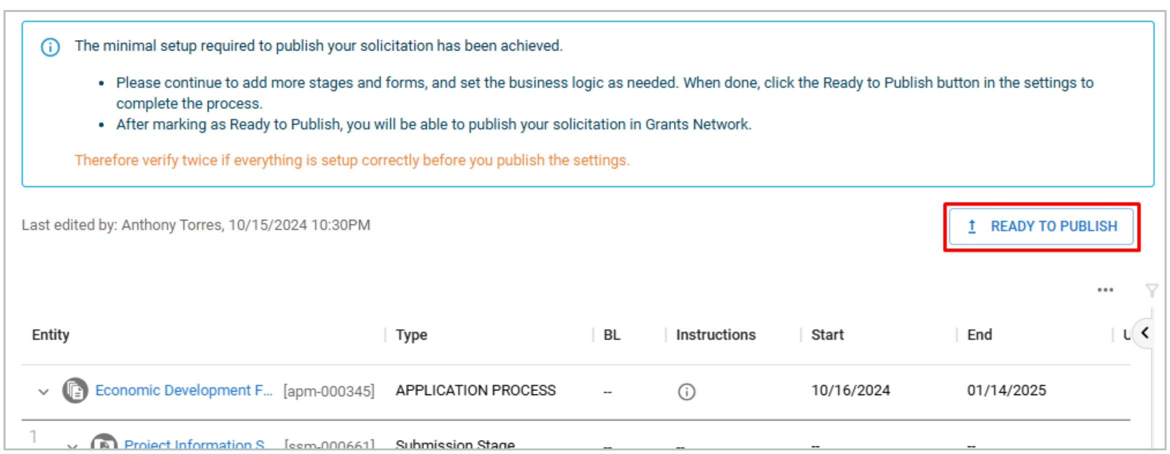

# Publishing a Program Solicitation

## Application Setup – Ready to Publish

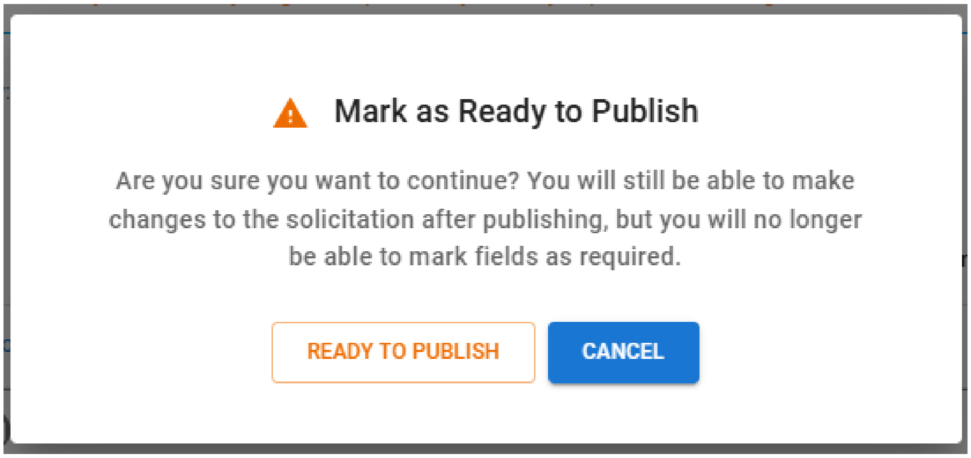
1. Once the necessary components of the Application Process have been completed, you will click the **Ready to Publish** button to enable the **Publish** command within Grants Network

   The minimal requirements are:

   - The Application Process contains at least 1 Submission Stage, and each Submission Stage is followed by at least 1 Evaluation Stage
   - Each Stage contains at least 1 Form that is successfully saved
   - Each Evaluation Stage has selections made in the **Set Content to Review** page



2. Confirm your selection in the popup message.



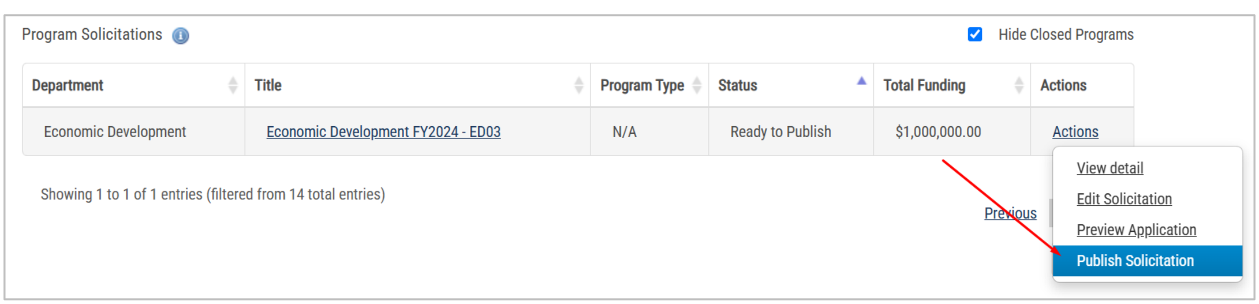

## Publish Solicitation

1. When the Program is **Ready to Publish** and the necessary Solicitation Edit page details have been confirmed, Grantors can Publish the Program Solicitation.

2. Click **Publish Solicitation** from the **Actions** menu on the Program Dashboard.

   ***Note:** To prevent issues during your program cycle, publishing your program will lock certain components of your Program Solicitation settings and the Application Process with its Forms. The locked items include:
   - The Budget Development setting on the Edit Solicitation > Submission Tab
   - The **Accept Multiple Applications Per User** setting from the Edit Solicitation > Submission Tab
   - The ability to mark additional form fields as **Required**
   - The ability to add or remove stages and forms

   ***Note:** Only Organization Master Account Holders (OMAH) and/or Department Master Account Holders (DMAH) may publish programs, depending on the preferences set up for your system. OMAH users will configure this by toggling the **Subrecipient Management Publishing** preference in the Organization Preferences.

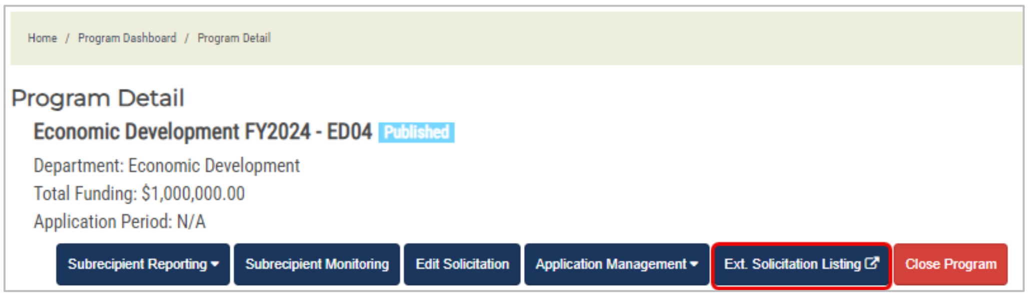


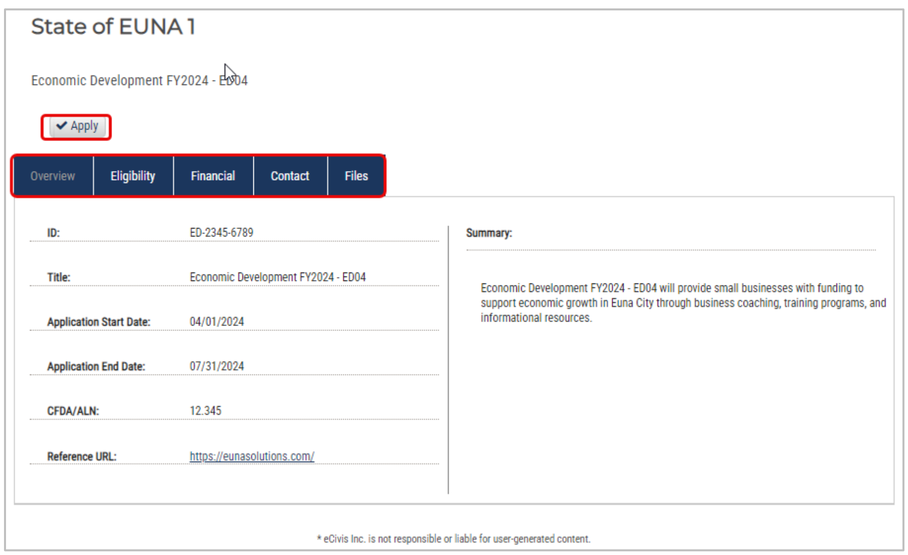
# Sharing a Published Program Solicitation

## Sharing the External Solicitation Page

Grant Management Tab > Subrecipient Management > Program Dashboard > Program Solicitation > Program Detail Page > Ext. Solicitation Listing

1. Starting at the Program Detail Page, you will simply scroll down and click on the **Ext. Solicitation Listing** button. This is simply another way to access the Public Solicitation Listing for your designated Program Solicitation.



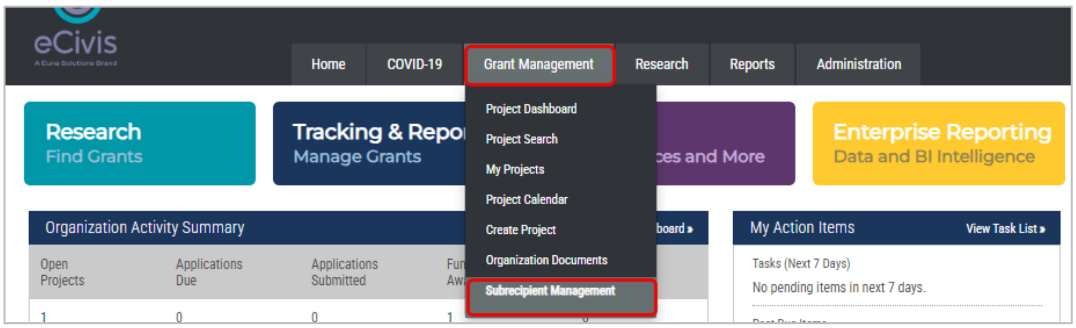

2. If corrections are needed, go back to the Solicitation Edit page and make any necessary updates. This will ensure the correct information will be viewed by Applicants for the 5 public-facing tabs as seen on the Public Solicitation page.

## The Public Solicitations Listing Page

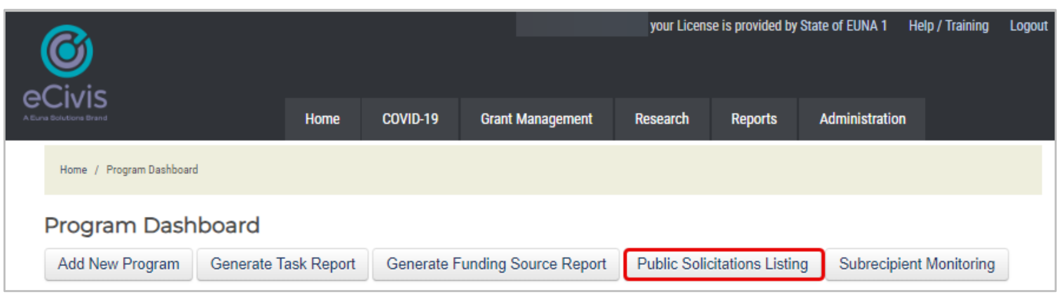
The Public Solicitations Listing Page is a shareable page that lists your programs currently open across all departments or within a specific department. This list is generated from Grants Network and can be shared via URL or embedded into your organization's website using an iframe code. Any programs set to **Public** within the **Listing Availability** setting (see the Overview Tab section earlier in this guide) will appear on this page.

[GN] Grants Management > Subrecipient Management > Program Dashboard > Public Solicitations Listing button > Public Solicitations Listing Page

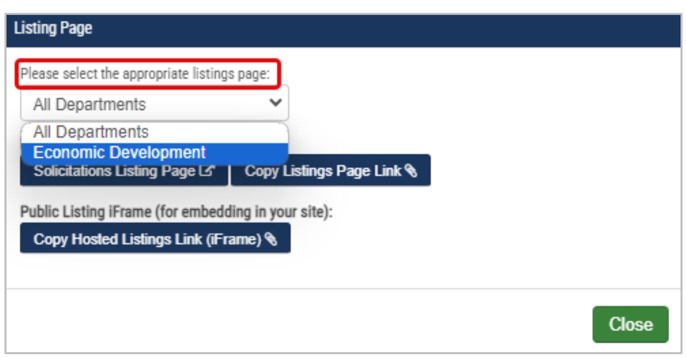
1. Starting on the Grants Management Tab scroll down and click on **Subrecipient Management**.



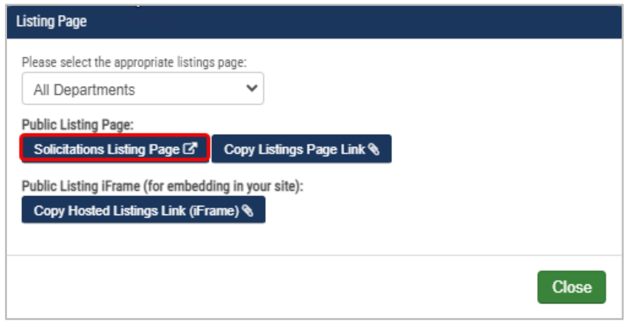

2. On the Program Dashboard click on the **Public Solicitations Listings** button.



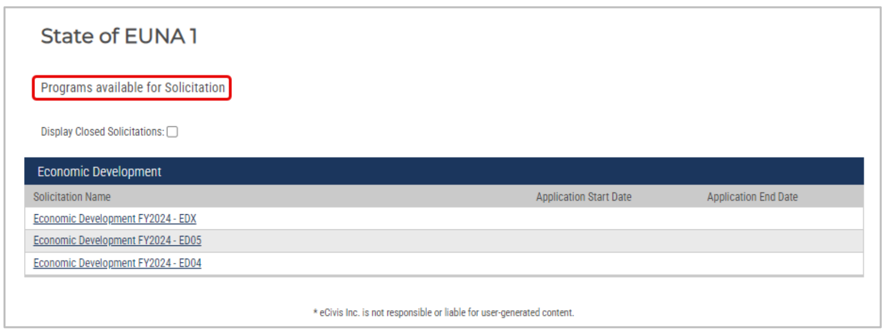

3. On the Listings Page, select the appropriate Listings Page (e.g., All Departments or by individual department).



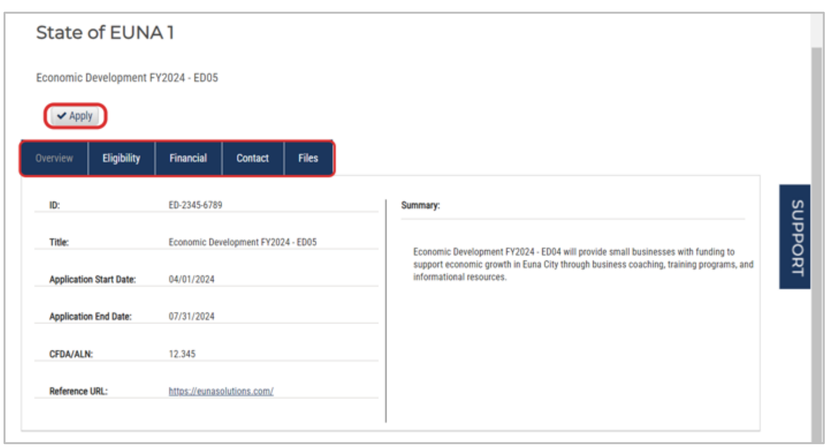
4. Scrolling down you will see the Public Listings Page, click the button to see the Solicitations Listing Page.



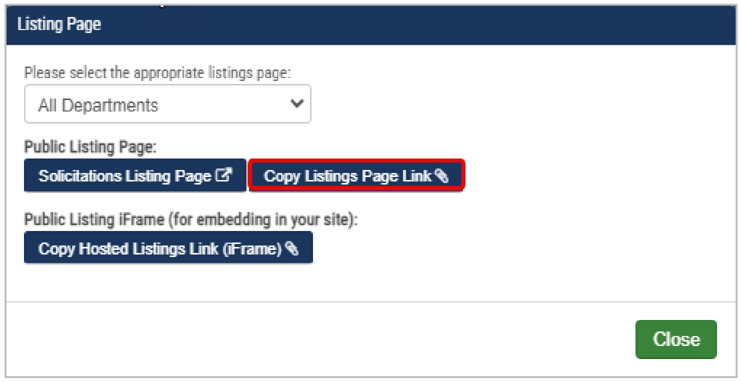

5. You will see currently open Program Solicitations and can access by clicking on the hyperlink.



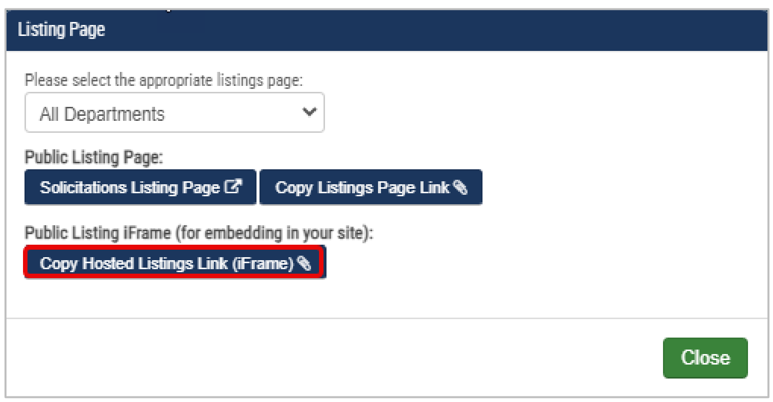

6. Once you click on a Program Solicitation's hyperlink, you will be taken to the Public Solicitation page for the designated Program Solicitation. An **Apply** button will appear if application start date is current and you will see the 5 public-facing tabs (Edit Solicitation).



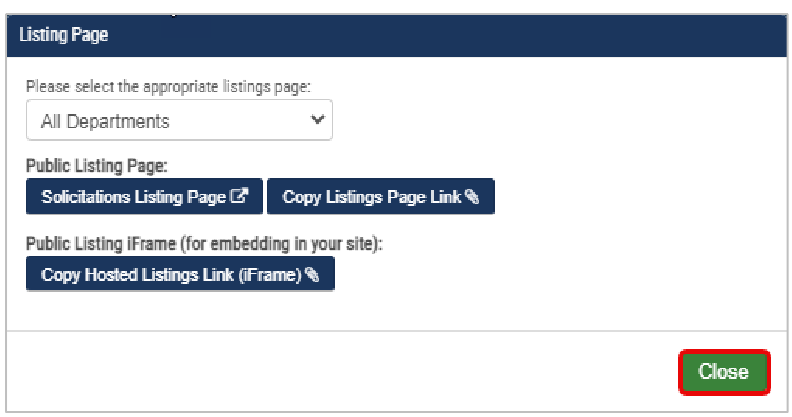
7. To return to the Public Solicitation Page, simply close the browser tab to return to the previous tab.
8. Back on the Listings Page, you will see the **Copy Listings Page Link** button. Simply click this button to copy and paste the URL. You can share the copied link with Applicants, or you can simply open a new window and paste the URL to view.




9. Scrolling down you can click on **Public Listing iFrame** for embedding in your site.



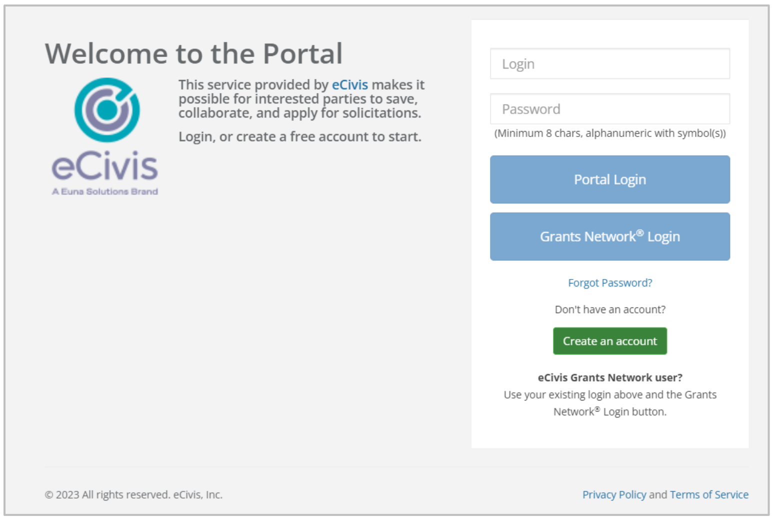

10. Once you are done with this window, click **Close**.



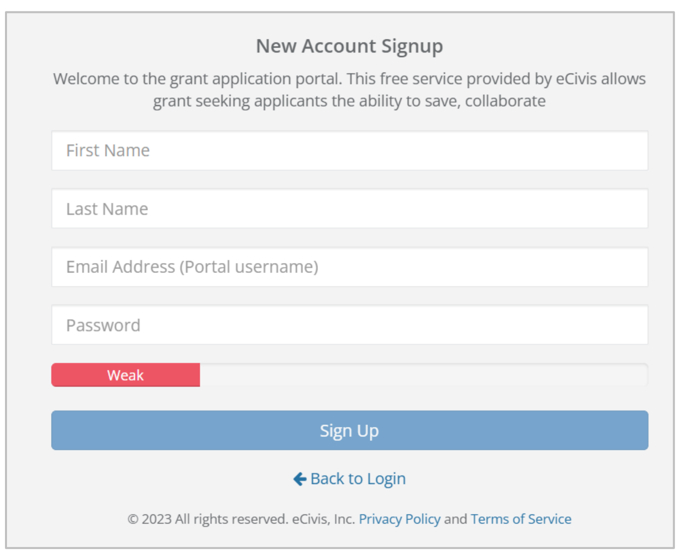
# Applicant Experience in eCivis Portal

1. Applicants will need an eCivis Portal account to manage their applications and awards.
   [https://portal.ecivis.com/#/login](https://portal.ecivis.com/#/login)

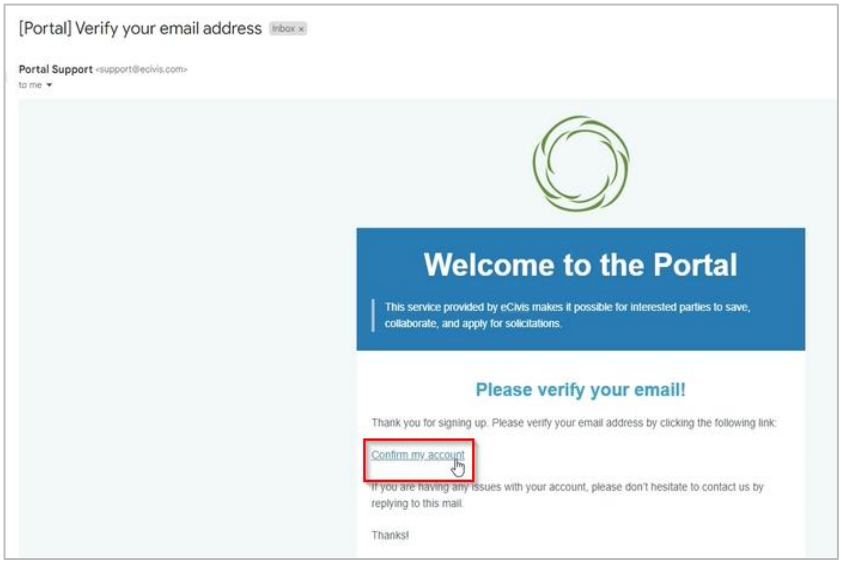
   ***Note:** Users who have a Grants Network user account can use those same credentials and click the **Grants Network Login** button.




2. If an applicant does not have access to eCivis Portal, they can simply click on the **Create Account** button and follow the steps to create an account to get started.

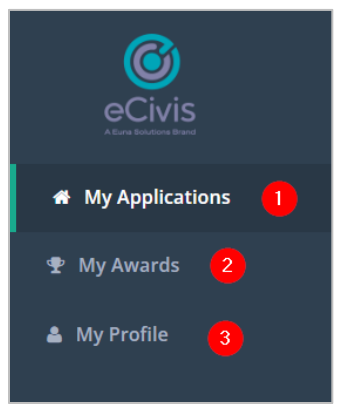


3. They will check their email and click the **Confirm my account** link to start using their eCivis Portal account.

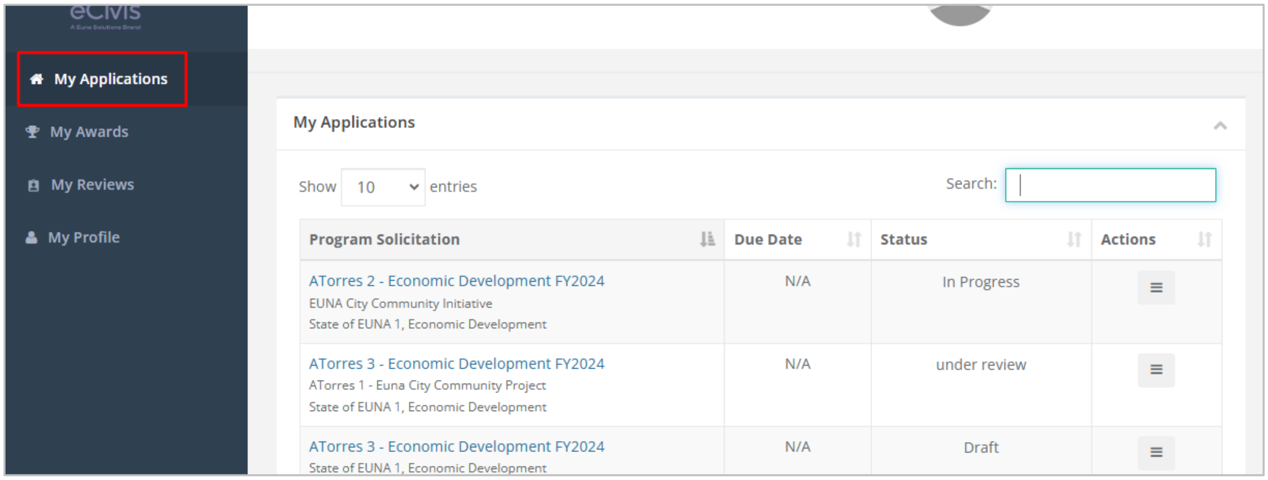



## Navigation

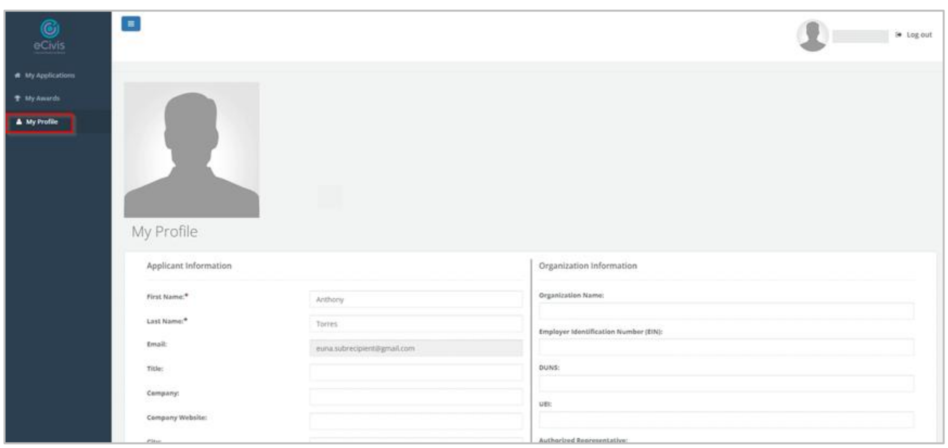
1. Once an applicant has logged into eCivis Portal, they will be taken to the home screen that includes the following:
    1) My Applications – Lists applications you currently
       have in eCivis Portal
    2) My Awards – Lists any awards that have been awarded
    3) My Profile – Lists organization information



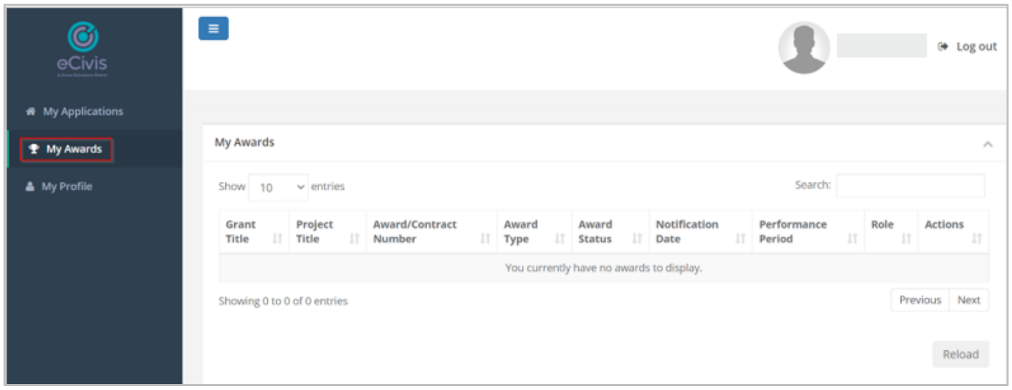
2. On the **My Applications** page you will see applications you currently have in the system, application status, and an Actions Column to view any information for the designated application.




3. On the **My Profiles** page you can add information to the Applicant Information and Organization Information. Items with a red asterisk are required fields. You can either click on **Update Profile** to save profile or simply click on the **Cancel** button if you need to cancel.

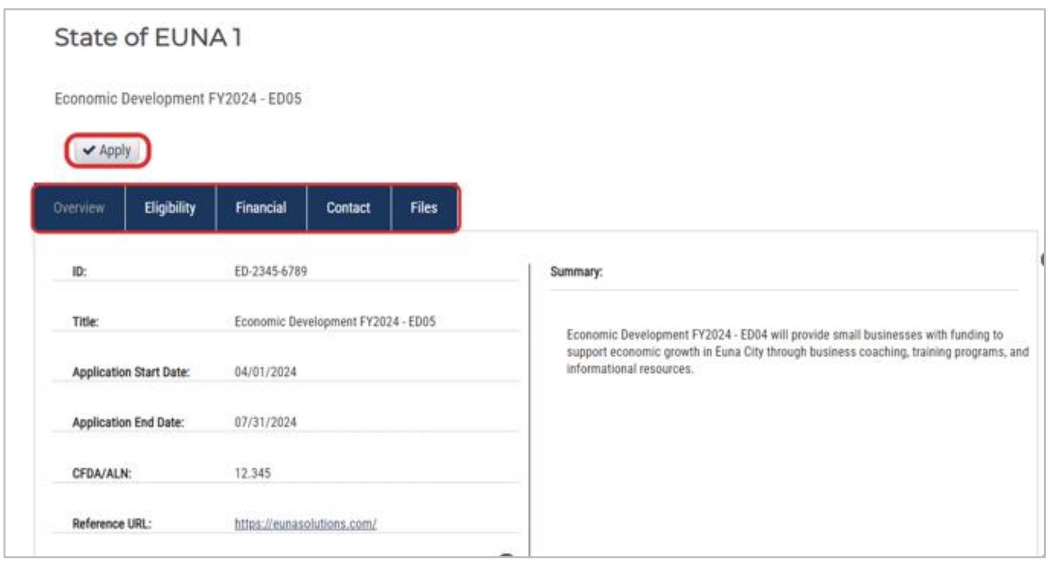


4. On the **My Awards** page you will see information here for any Awards that have been awarded. At this time there are no awards listed as the process is to begin for an applicant to apply for a Program Solicitation.

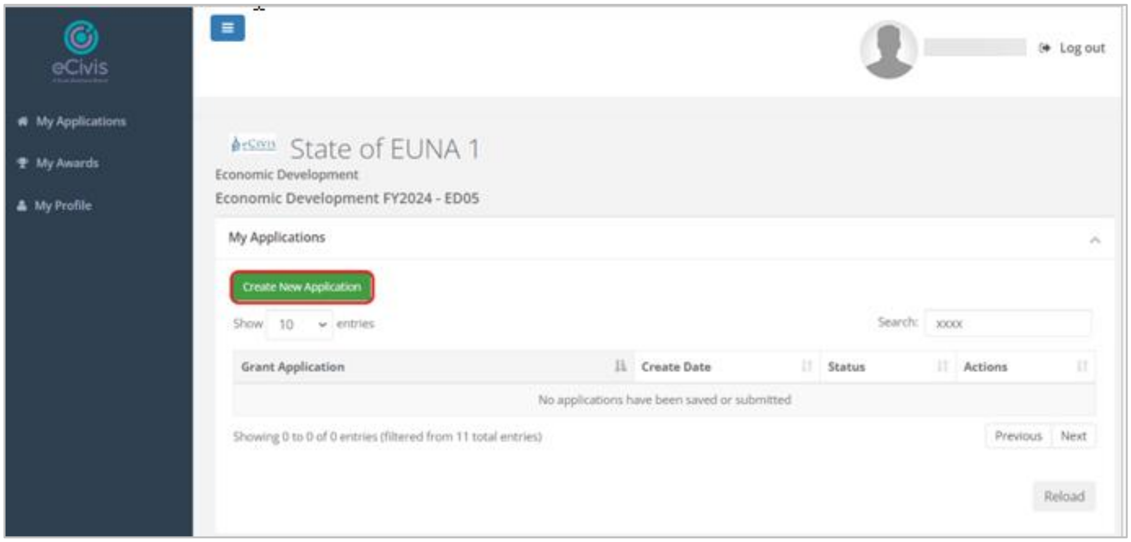



## Submit an Application

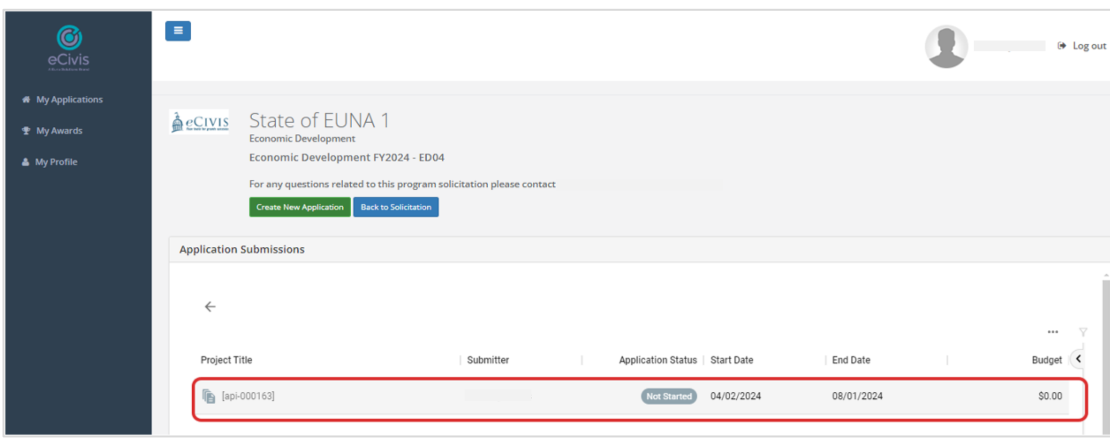
1. Click the **Apply** button on the Program's Solicitation page to begin the application process in eCivis Portal.



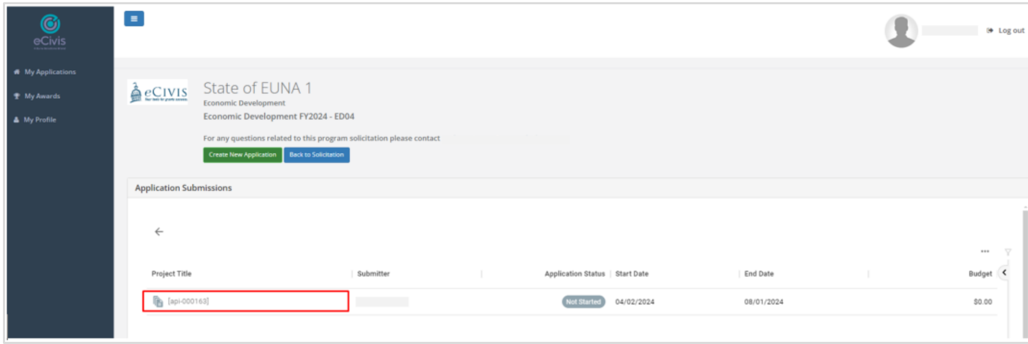
2. Click **Create New Application**



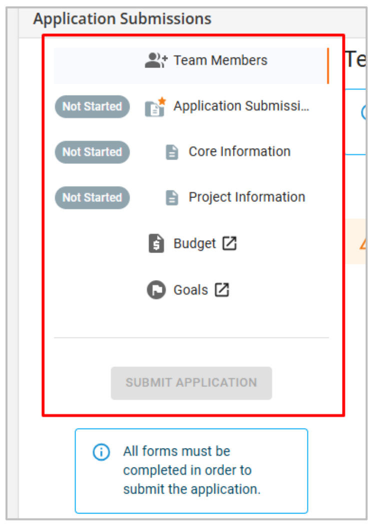

3. The new application will appear on the Application Submissions table.
*__Note:__ If the Program allows multiple application submissions from the same applicant, this table will list any other application submissions they create toward this Program.



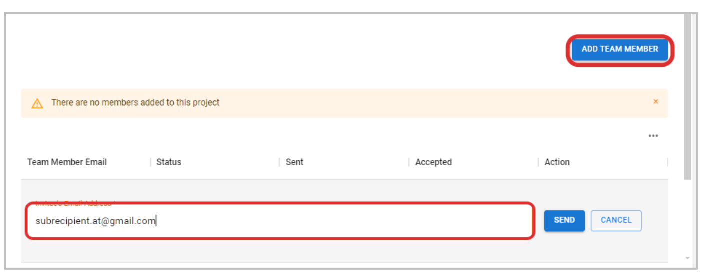
4. Click on the newly added Project Title (labeled with a unique code beginning with "api-")




5. Applicants will use the following components in the left-hand panel to manage and submit their application:



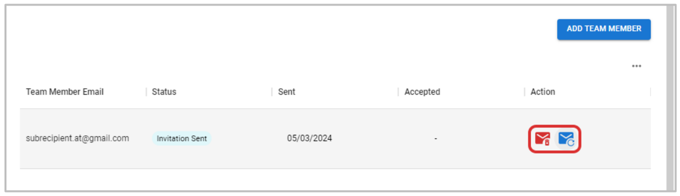

   a. **Team Members:** Add Team members to collaborate on this application.
      i. Click **Add Team Member**
      ii. Enter the invitee's Email Address and click **Send**



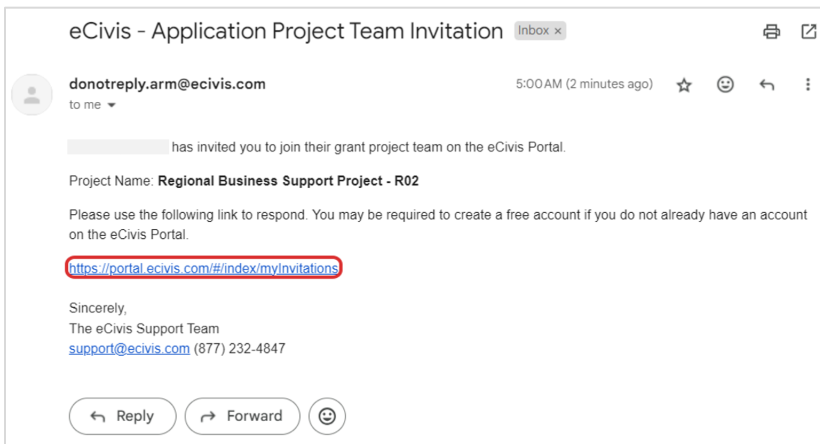

      iii. Project Team Members invitations will be sent and be listed in the status as **Invitation Sent**

.

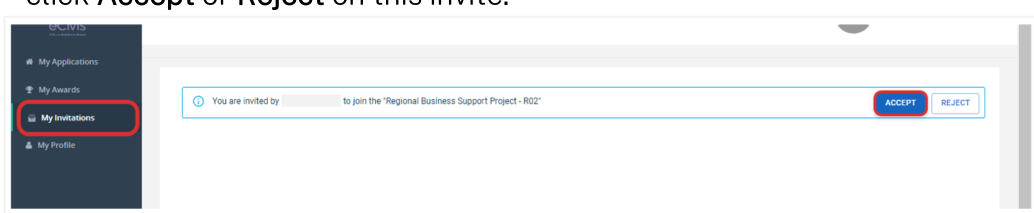
*Note: If the invitation needs to be deleted, you can click on the red envelope icon and if it needs to be resent you can click on the blue invitation icon.




iv. The invitee will receive an email to access eCivis Portal and accept the invitation.
*Note: The invitee must set up a Portal account if they have not already done so.

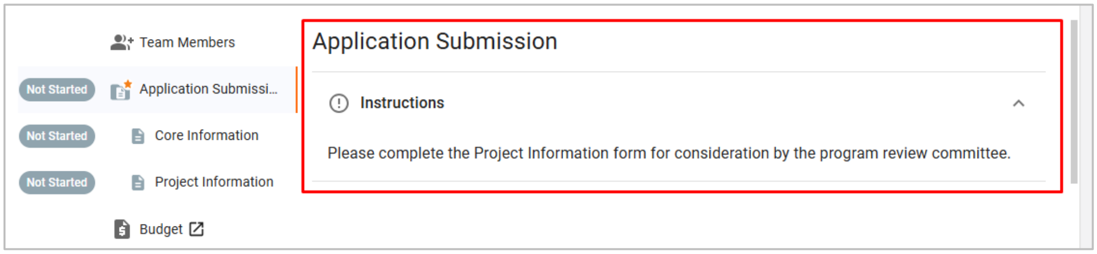



v. In Portal, they will click **My Invitations** from the navigation bar and click **Accept** or **Reject** on this invite.



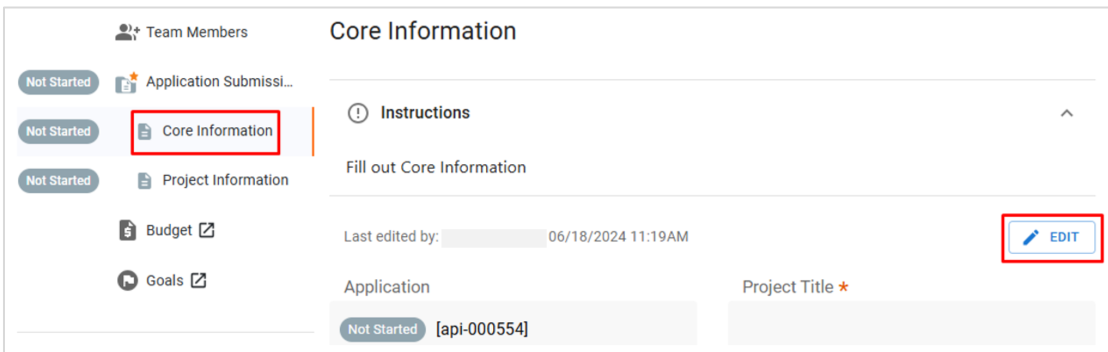
b. **Submission Stage:** The starred folder icon  indicates the current Submission Stage to be completed

   i. Open this section to view the title and instructions for this Submission Stage

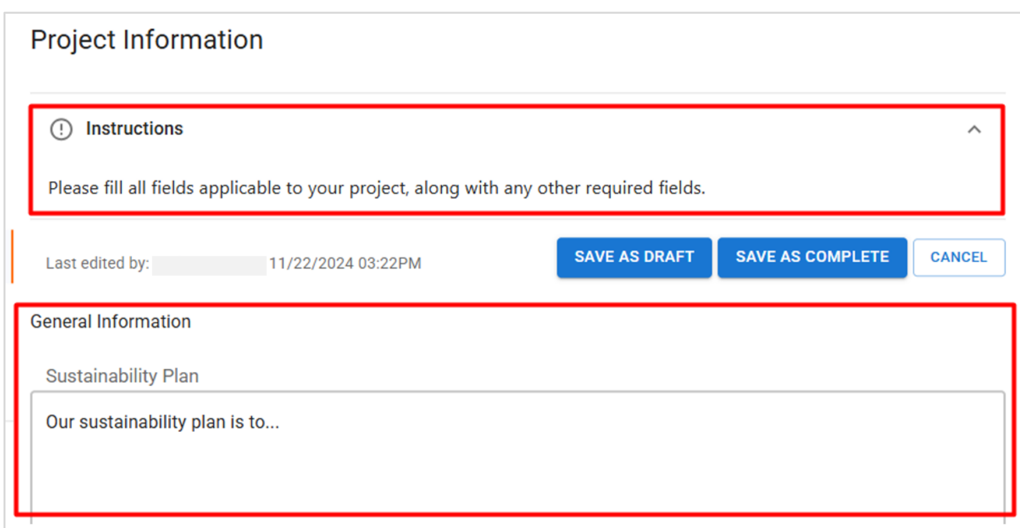



c. **Application Forms:** Open and edit each form until complete

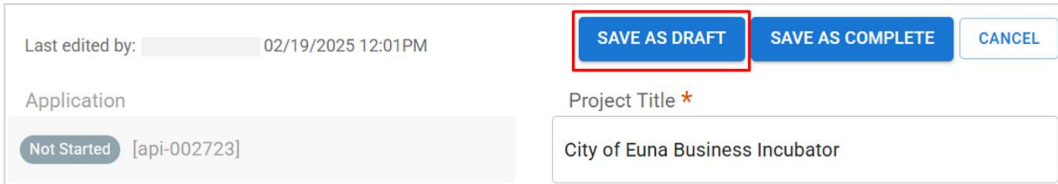
   i. Select the form from the left-hand panel and click **Edit**



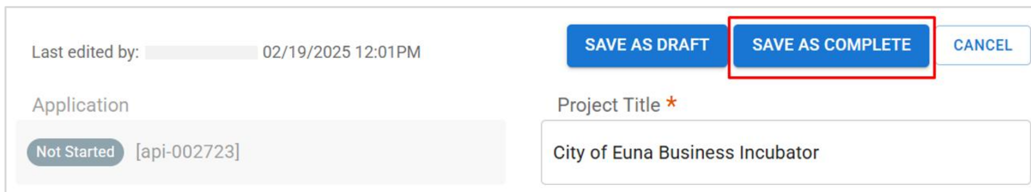

   ii. Expand the Instructions section to review important details provided by the Grantor before continuing to fill the form.



iii. Click the **Save Draft** button to save all form details (either to return to it later or in preparation to mark the form complete)

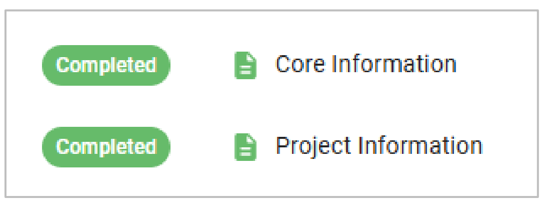



iv. When all required fields are complete and all edits are finalized, click **Save As Complete.**

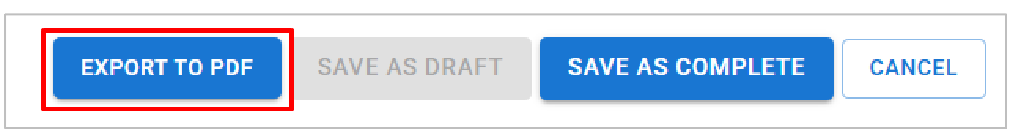



v. Any forms you save as complete will update to the green **Completed** status

*__Note:__ All included application forms must be marked complete and, if it is included, the Budget Worksheet must have a requested total amount before you can click the **Submit Application** button. Continue to the next section for those instructions.

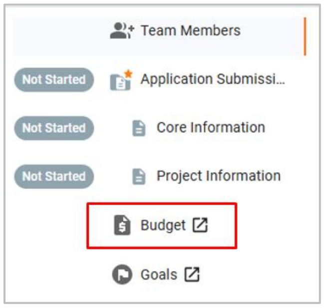


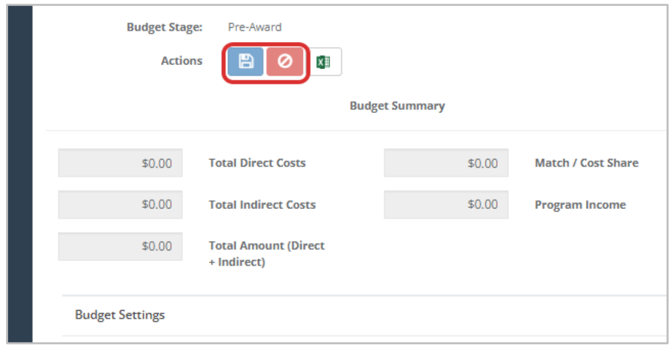

To export a copy of the filled application to PDF format, click **Export to PDF** from the top-right corner of the page




d. **Budget:** Fill the Budget Worksheet to propose an award amount and to itemize budgeted costs as needed. This worksheet will be used later, if awarded, to document the final award and to track spending.

i. Click **Budget** from the left-hand bar. The Budget Worksheet will open in a separate browser tab.
[Refer to “Appendix D: Budget Worksheets” for more information on completing the worksheet]

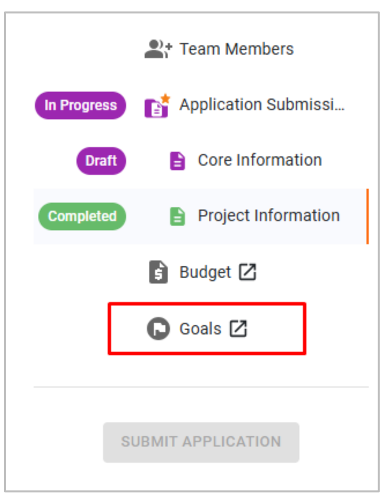



ii. When finished editing and saving the worksheet, close the browser tab containing the budget and return to the previous tab containing the application

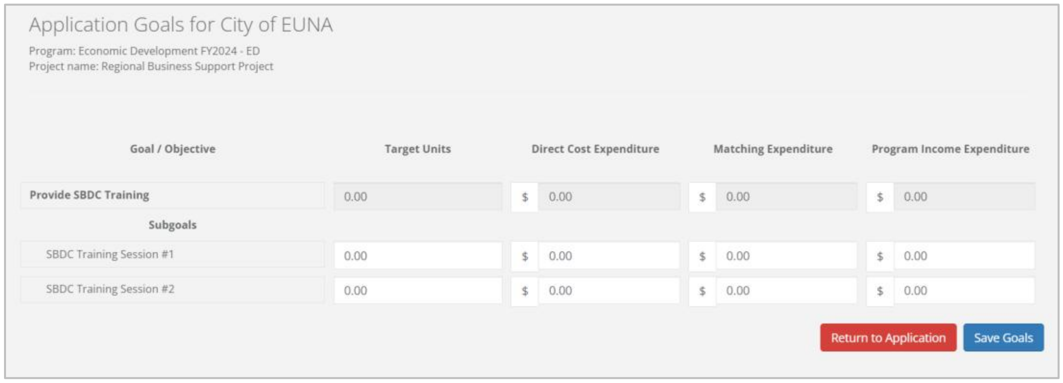
e. **Goals:** If included, fill the Goals Worksheet to propose project goals. This worksheet will be used later, if awarded, to document the final goal target amounts and to track activity against those goals.

i. Click **Goals** from the left-hand bar. The Goals Worksheet will open in a separate browser tab.



ii. Enter the target amounts for any applicable goal areas that your project will address

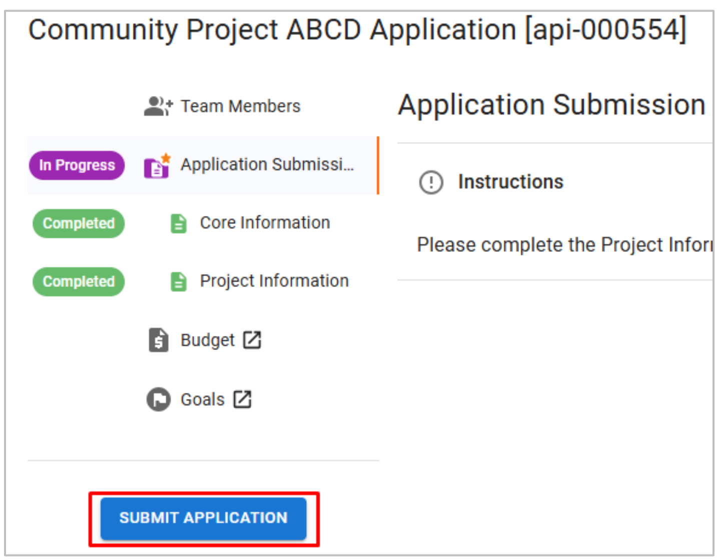
***Note:** The expenditure fields are not required during application but may be used when Awarded and submitting Activity Reports.



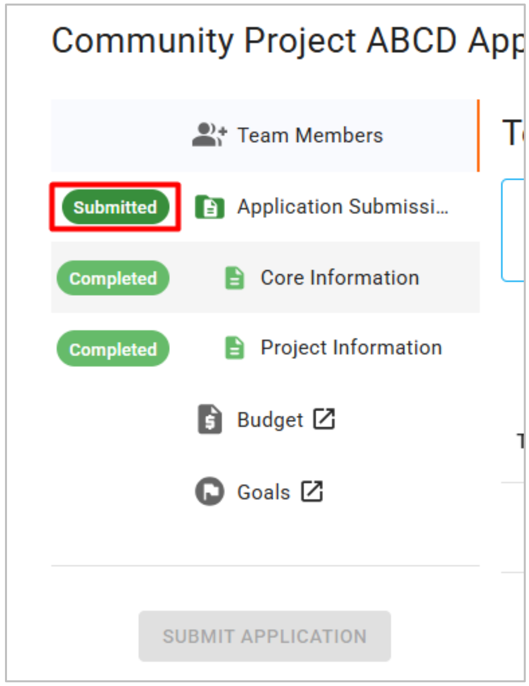

iii. When finished editing, click **Save Goals**

iv. Close the browser tab containing the goals and return to the previous tab containing the application.

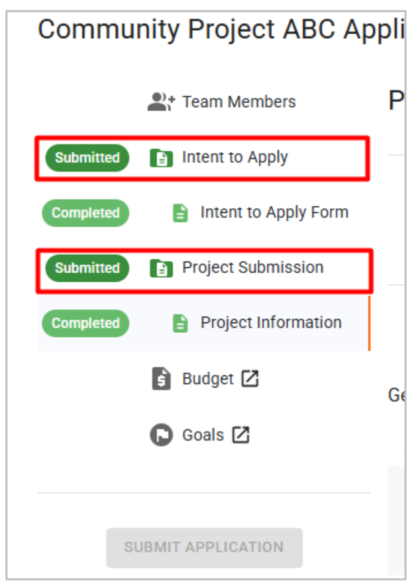
6. Once all forms and required worksheets have been completed, the application can be submitted. Click **Submit Application** from the left-hand panel.



7. If the submission is successful, the status label beside the Submission Stage name will change from **In Progress** to **Submitted**.



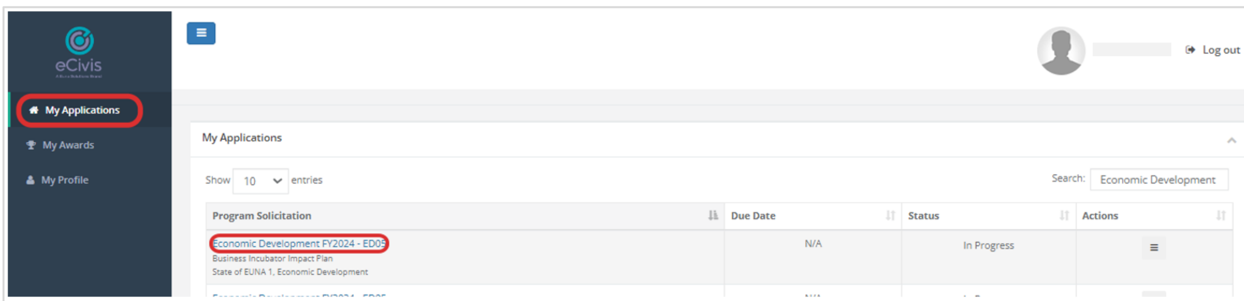

*__Note:__ If the program has multiple Submission Stages, pay attention to the Submission Stage titles (indicated by a folder icon).



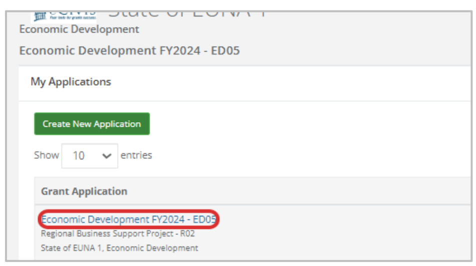
If you are caught up, you should see NO stages with a yellow star over the folder icon and with a status of **In Progress**.


8. The Grantor will then assign Review Committee members to access and review select portions of the application content.

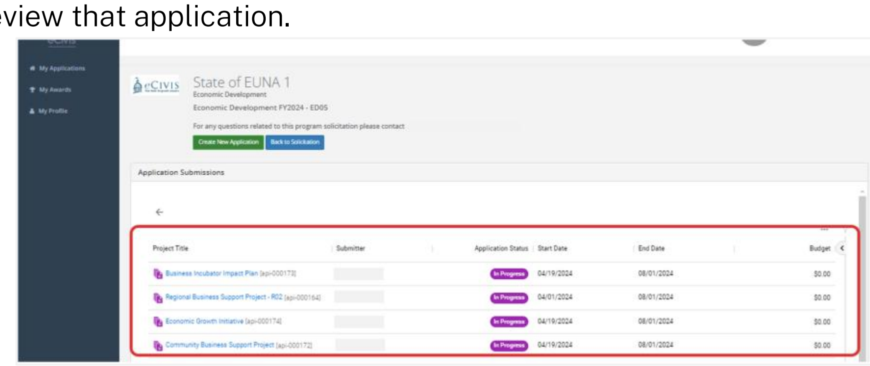
9. Applicants can access current or prior applications by clicking **My Applications** from the left-hand navigation bar. They can search or sort the headings of this table to find their application.




10. Click any of the linked titles in this table (all of which should match the name of the program they selected in the prior step)




11. This will bring them to a table of all applications they have submitted to this program (some programs allow multiple application submissions). Click the applicable **Project Title** to review that application.

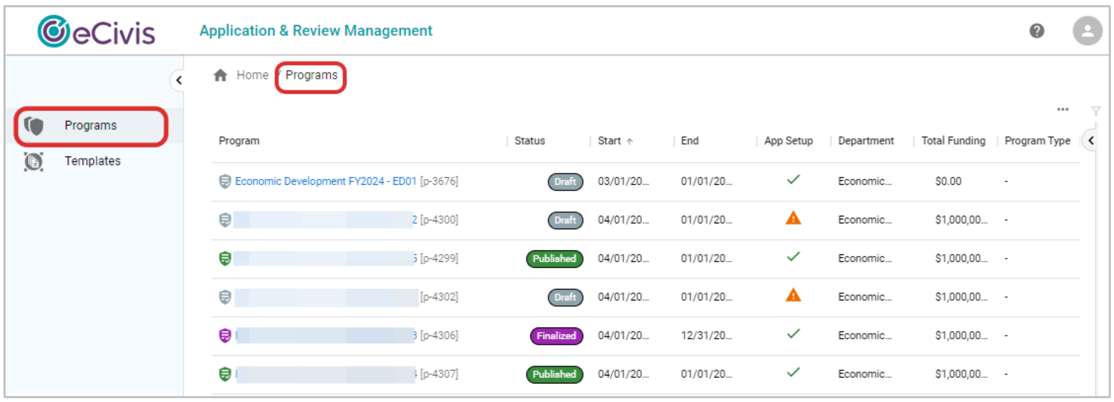


# Navigating Application & Review Data

The below sections will walk through the Grantor perspective of application and review data across multiple programs.

## All Programs Page

1. The Programs page will provide a list of all Programs to which the user has access within the Application & Review Manager System.




## Programs Page Key Icons

1. Program Icon – clicking on this icon will allow the user to land on the Programs Listings Page
2. Expand/Collapse Arrow – Expand the Left-Hand Navigation Bar
3. Programs Listings Page – this provides a dashboard of all Program Solicitations in the system.
4. Breadcrumb Trail – lists the program path to current page.
5. Export – user can export table data to .CSV or PDF File
6. Filter – allows the user to filter data listed on Program Page (e.g., column header)
7. Program List Column Headings


The Programs page includes the following column headers:

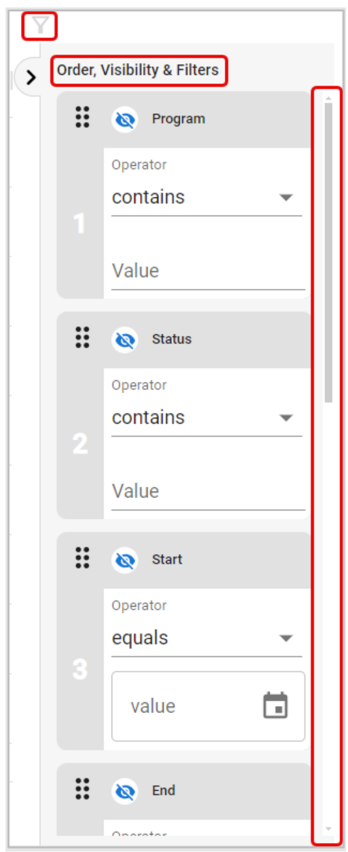
1. Program – Name and unique identifier for Program Solicitation
2. Status – Status of the Program (e.g. Draft, Ready to Publish, Published, Closed, Archived)
3. Start – The start date of the Application Process set up for program

4. End – The end date of the Application Process set up for this program
5. App Setup – Checkmark will display next to programs where the Application Process is set up with the minimal requirements achieved. A warning symbol indicates that this has not been completed
6. Department – The department name in which this Program was created
7. Total Funding – Total amount of funding allocated to this program
8. Program Type – Indicates whether the Program is a Subprogram, or tied to a Subprogram

| Program | Status | Start | End | App Setup | Department | Total Funding | Program Type |
|---|---|---|---|---|---|---|---|
| Small Business Support ARM FY2023 [p-3647] | Draft | - | - | ⚠ | Adminis... | $0.00 | - |
| Economic Development FY2024 - ED01 [p-3676] | Draft | 03/01/2... | 01/01/2... | ✓ | Economi... | $0.00 | - |

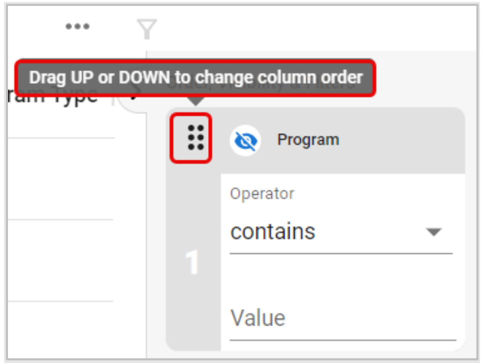
## Filter Icon

Users can utilize the Filter Icon for **Order, Visibility, & Filters**. A scroll bar is also available on the side of filters area so a user can scroll down to view additional column settings.

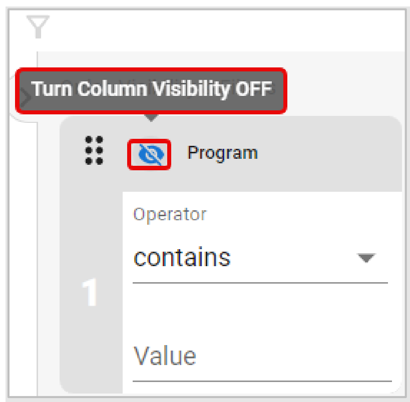


Use the below commands to modify the view of table data

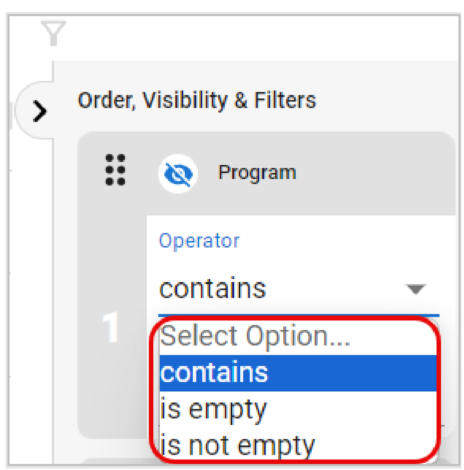
1. Order – allows user to drag up or down to change column header order.



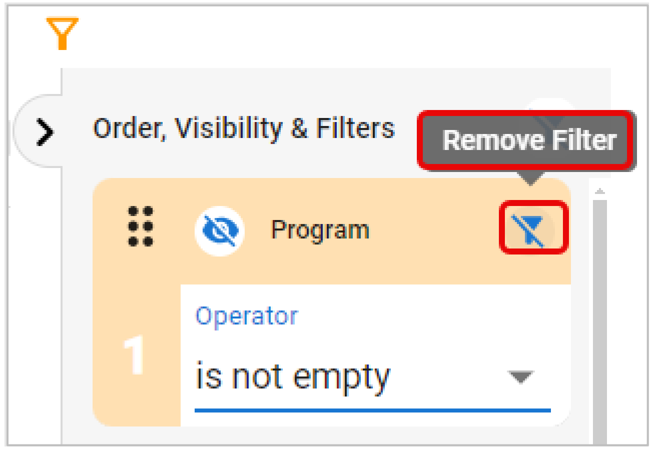

2. Visibility – allows user to turn off column visibility



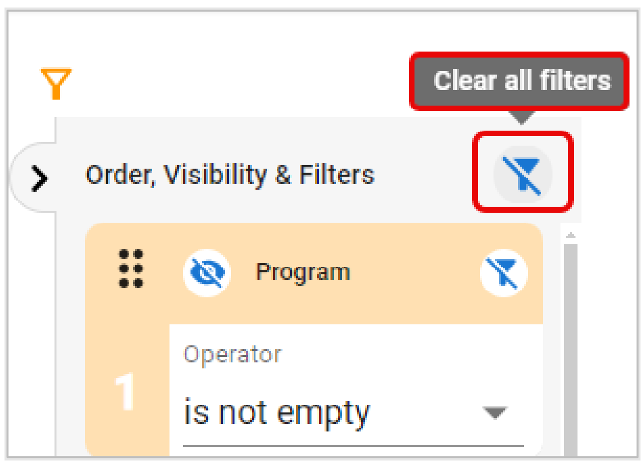

3. Filter
    a. Allows user to select an option to filter data.



b. Once Filter has been turned on you will see an orange background on Filter field. To turn off Filter simply click on **Filter** shown on Filter field.

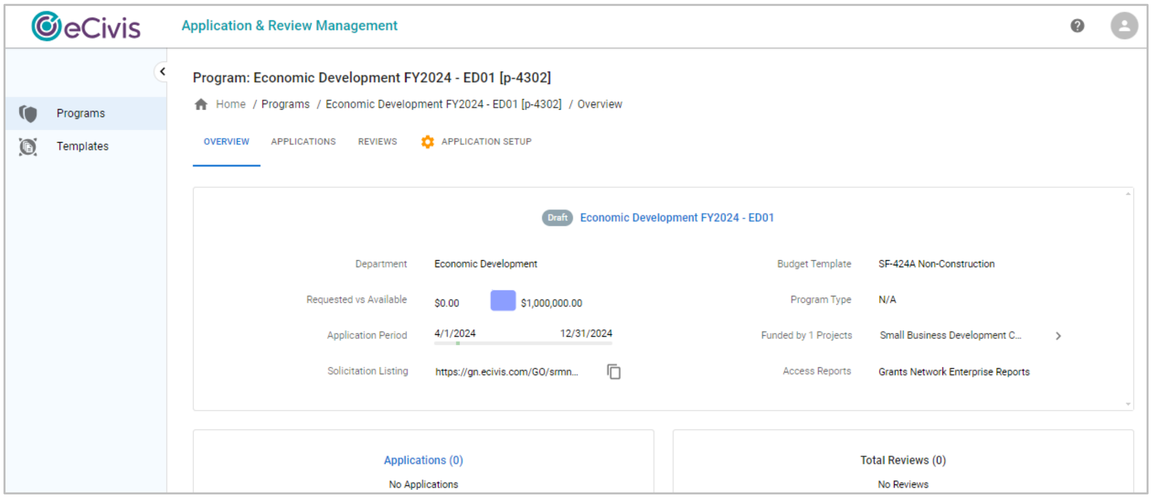



c. To clear all filters, click on **Clear all filters** and default will be displayed.



## Program

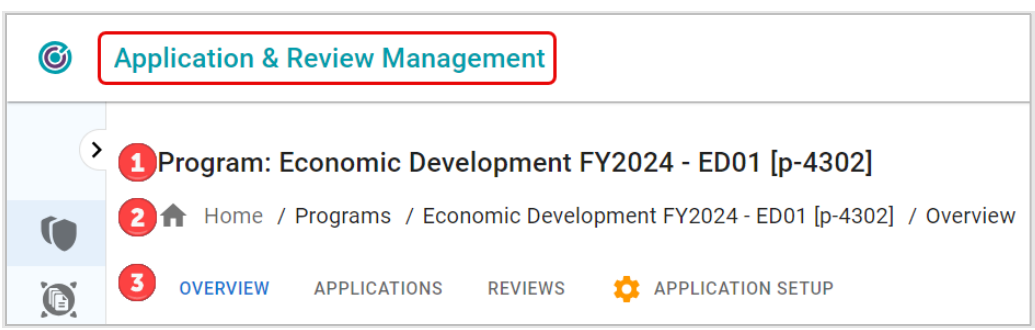
While a Program is running, use the top headings of the Program page to view and manage its applications and reviews.




### Key Features

The Program Overview page displays important information for the designated Program.

1. **Program Name**: lists the program name and includes Program ID
2. **Bread Crumb Trail** – shows the trail of links to arrive at the current page
3. **Navigation Tabs**
    a. Overview Tab
    b. Applications Tab
    c. Reviews Tab
    d. Application Setup Tab

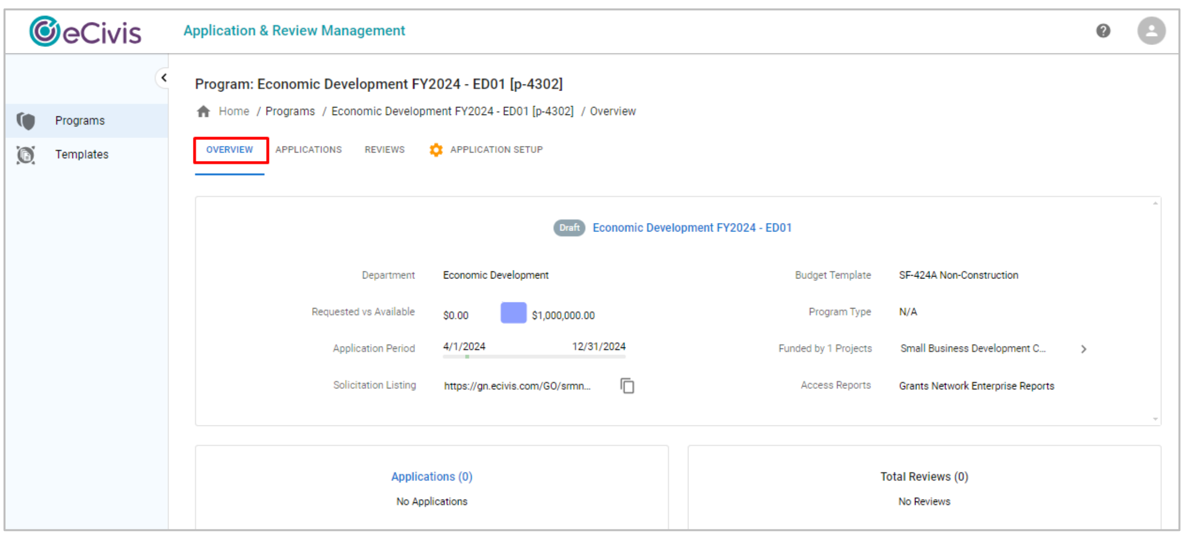



4. **User Support Icons**
   User Support Icons include the following:
    1. Help Desk Icon
        a. eCivis Help Center

2. User Settings
    a. Settings
    b. Profile


## Overview

1. The Overview Tab provides an overview of the Program as seen below in screenshot.

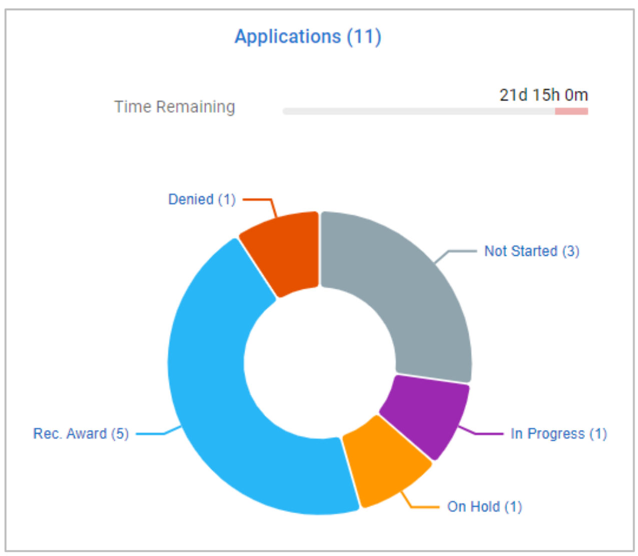



2. Scrolling down the page, you can view the Program Information and its Status.

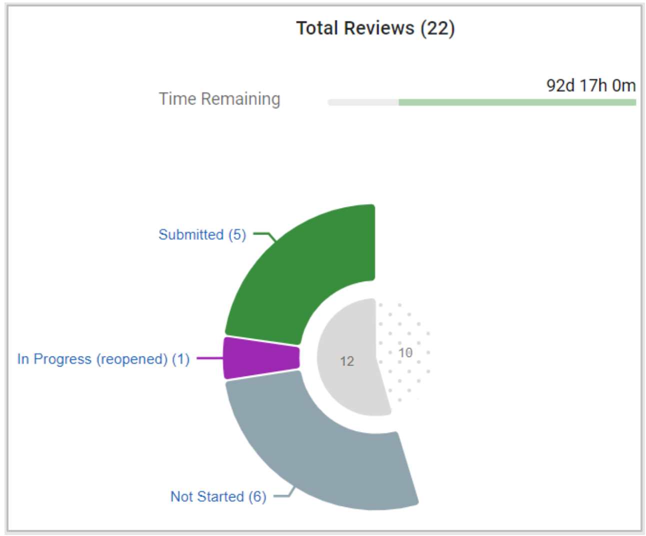
3. Status of Program – the following are the different statuses that may be displayed next to the Program Name.

    a. Draft – Indicates information can be edited
    b. Ready to Publish – Indicates all information has been finalized and is ready to move to the next stage of Published
    c. Published – The application has been published by the Grantor
    d. Closed – The program has been closed by the Grantor
    e. Archived – Inherited data from previous Application Management System

4. Applications Chart
   This section provides a pictograph of the Applications submitted, how much time is remaining in the Application Process, and lists the statuses of Applications (e.g., Not Started, In Progress, On Hold, Recommend Award, Denied)

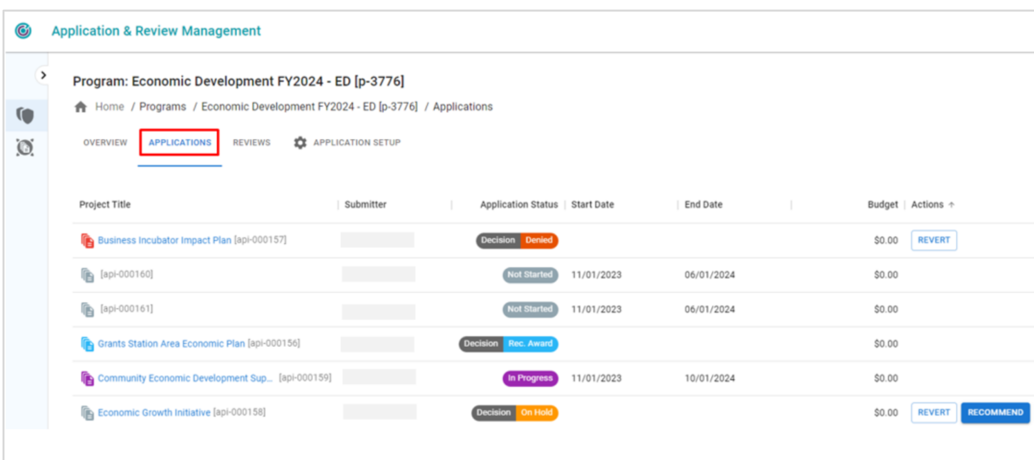


5. Total Reviews Chart
   This section provides a pictograph of the Total Reviews submitted, how much time is remaining in the Application Process, and lists the statuses of Applications (e.g., Not Assigned, Not Started, In Progress, Submitted).



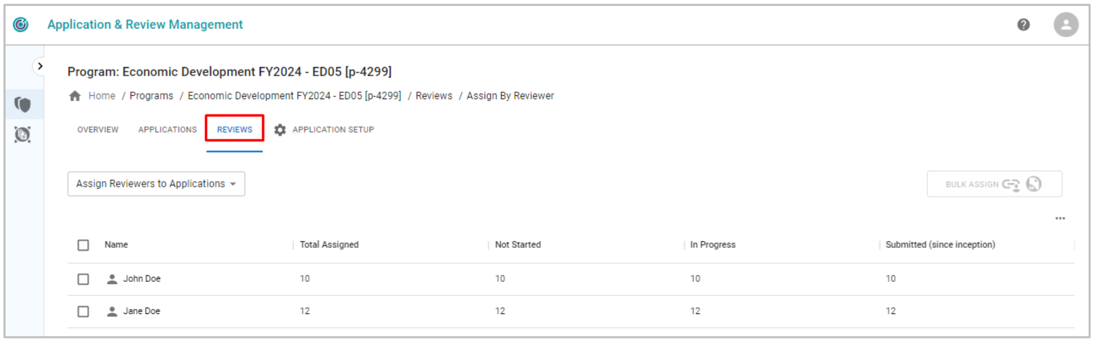

## Applications

1. Applications will be listed here once applicants start the application process.



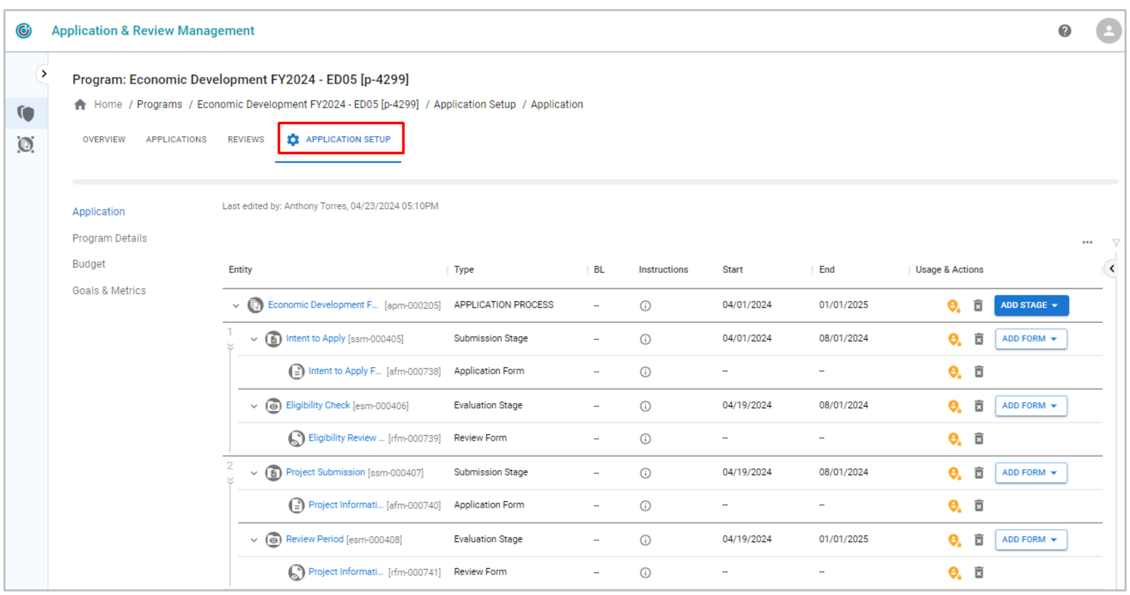
## Reviews

1. A list of designated Reviewers will be seen if Grantor has already assigned while managing the **Edit Solicitation** page in eCivis Grants Network. If a Grantor has not completed this step and simply started creating the Application, no data will be found as the process has not started for the Reviewers to be listed.




## Application Setup

1. The Application Setup page will display the details of the Application Process once it is built.

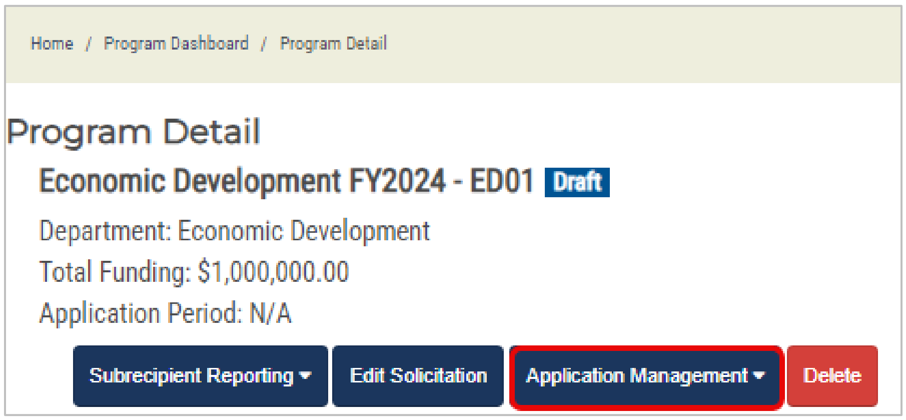


# Managing Application Submissions

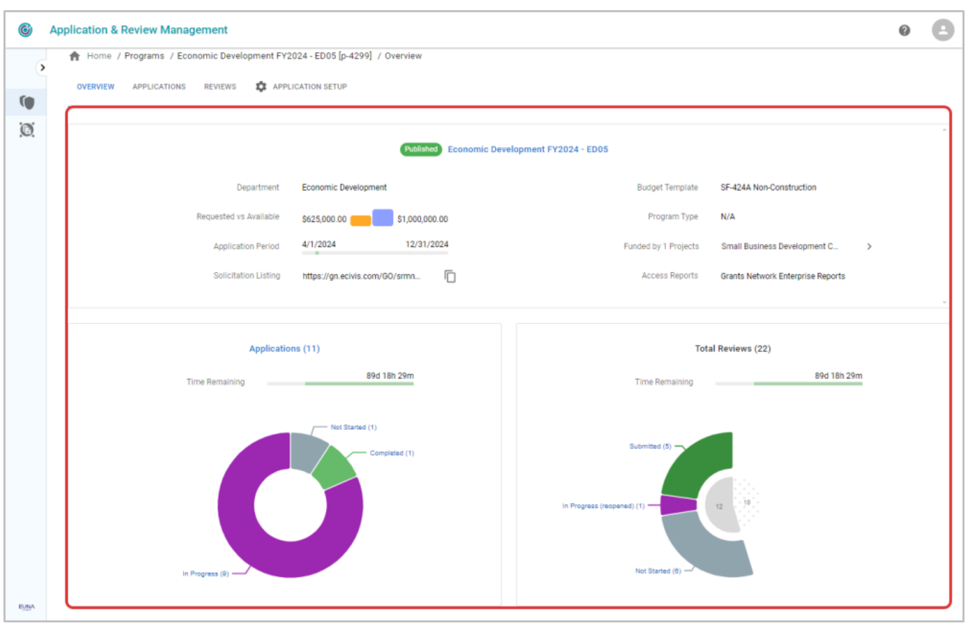
Grant Management Tab > Subrecipient Management > Program Dashboard > Program Solicitation > Program Detail Page > Application Management

## Monitoring Applications

1. The Grantor will log into Grants Network and continue the process by accessing the Application and Review Manager button on the Program Detail Page.



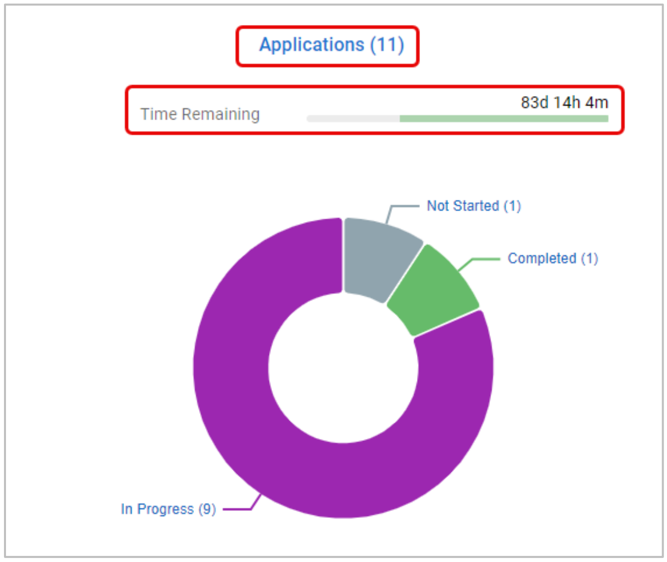

2. This will open to the Application & Review Manager Dashboard:



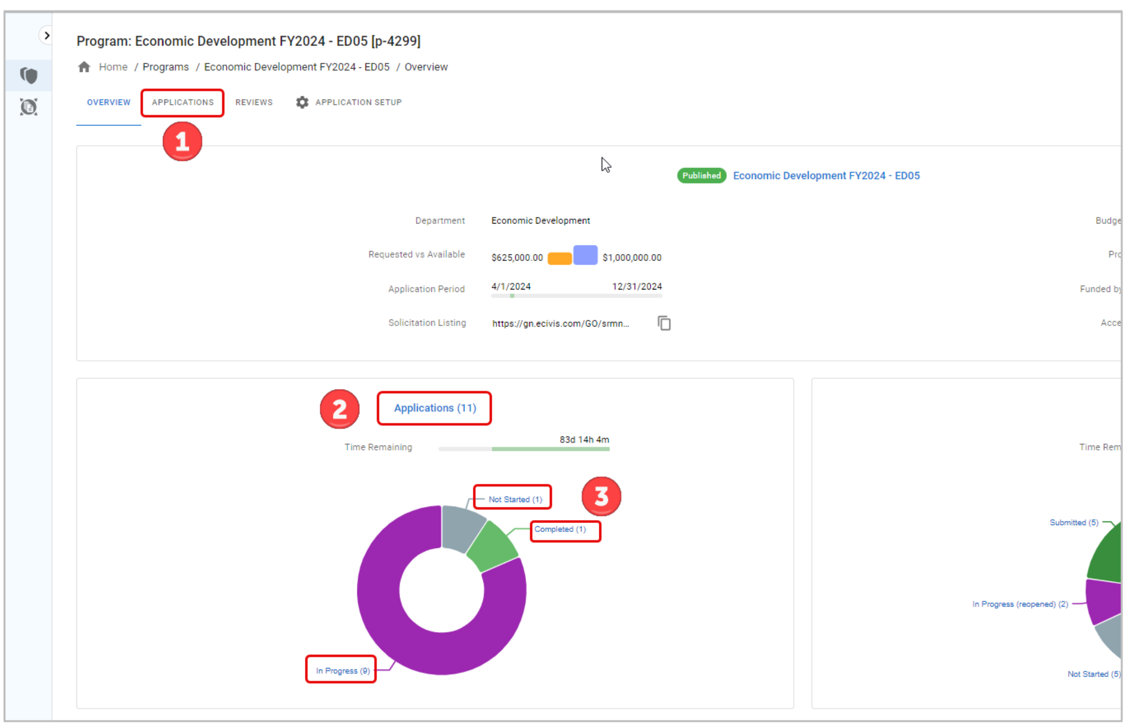



EUNA Grants

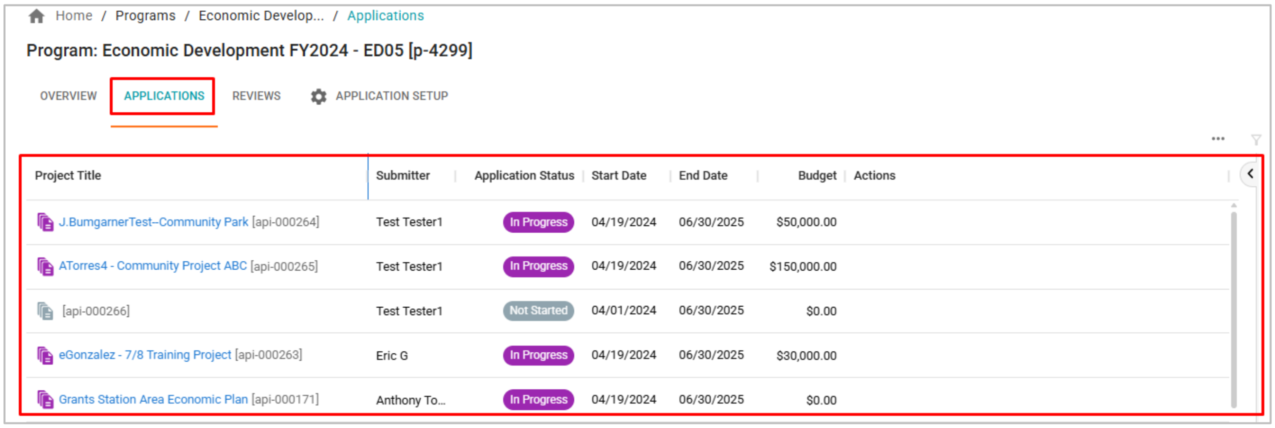
3. Use the donut charts, as shown here, to monitor the statuses of all applications and Time Remaining in the Application Process:




4. You can access Applications by clicking on the following on Program Page Dashboard
    1. Applications Tab
    2. Applications Link on Chart
    3. Clicking on the hyperlink for each designated status will access the Applications for that designated status.



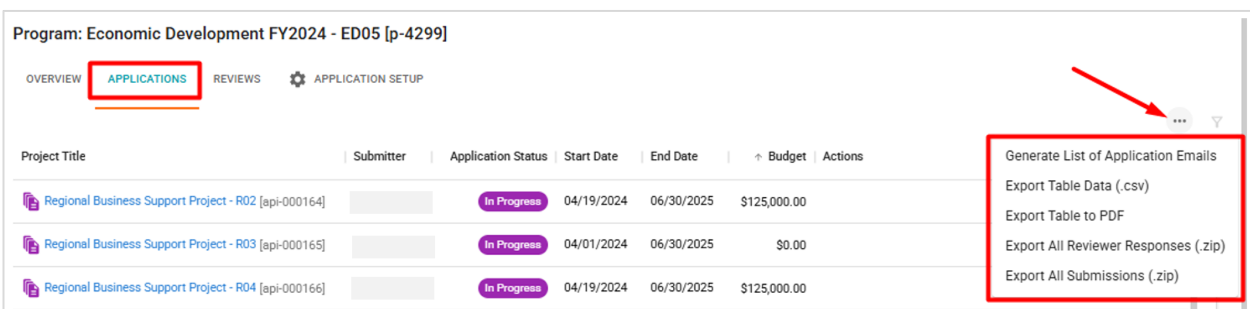
5. Use the Applications table to analyze and export all application data, or to access individual applications




## Exporting Application Data

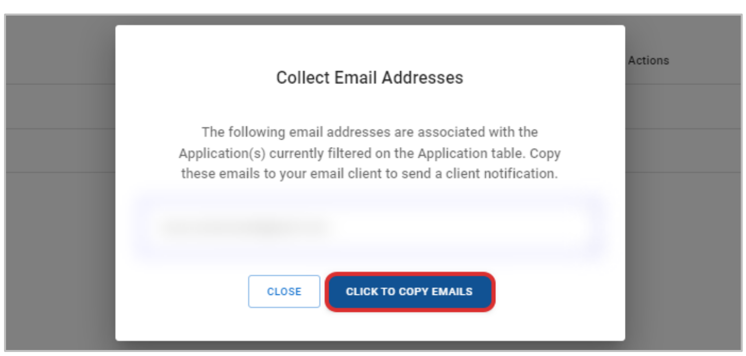
### Exporting the Table

To export data from the table of submitted Applications, select the Applications section of your program and click the menu button (three dots) on the top-right corner of the table.




You may use one of three export options:

1. Generate List of Application Emails: Copy all applicant emails to another location



2. Export Table Data (.csv): Exports all visible data from the Applications table to a .csv file.

| | A | B | C | D | E | F |
|---|---|---|---|---|---|---|
| 1 | Project Title | Submitter | Application Status | Start Date | End Date | Budget |
| 2 | n/a | John Doe | Not Started | 2024-04-02T04:00:00Z | 2024-08-01T04:59:00Z | 12500 |
| 3 | n/a | Jane Doe | In Progress | 2024-04-02T04:00:00Z | 2024-08-01T04:59:00Z | 14500 |

3. Export Table to PDF: Exports the application data to a PDF file.

Applications for Program: Economic Development FY2024 - ED04

Filters Applied: None

| Project Title | Submitter | Application Status | Start Date | End Date | Budget |
|---|---|---|---|---|---|
| n/a | | Not Started | 04/02/2024 | 08/01/2024 | 0 |

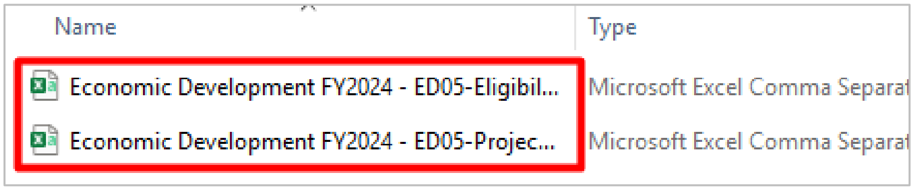
## Exporting All Data from Submissions and Reviews

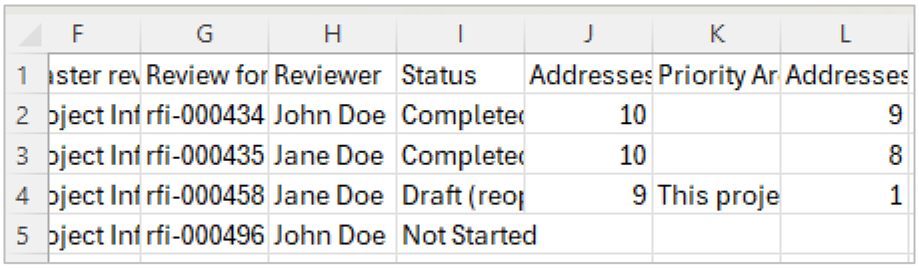
1. Export All Submissions: Exports a .zip file containing all response data for each Application Form field. You should see separate .csv files for each form across all submission stages.

| Name | Type |
|---|---|
| Economic Development FY2024 - ED05-Intent to Apply Form-[afm-000738]... | Microsoft Exce... |
| Economic Development FY2024 - ED05-Project Information-[afm-000740]-... | Microsoft Exce... |

| | A | B | C | D | E | F |
|---|---|---|---|---|---|---|
| 1 | Program N | Program I | Project Title | Applicatio | Org Name | Master |
| 2 | Economic | 4299 | Regional Bus | api-00016 | City of EUNA | Intent t |
| 3 | Economic | 4299 | Euna City Bu | api-00017 | Town of EUNA | Intent t |
| 4 | Economic | 4299 | Grants Static | api-00017 | Eunaville | Intent t |
| 5 | Economic | 4299 | Community E | api-00017 | Township of E | Intent t |
| 6 | Economic | 4299 | Business Inc | api-00017 | EUNA Commu | Intent t |
| 7 | Economic | 4299 | Economic Gr | api-00017 | Town of EUNA | Intent t |

2. Export All Reviewer Responses: Exports a .zip file containing all response data for each Review Form field. You should see separate .csv files for each form across all submission stages.

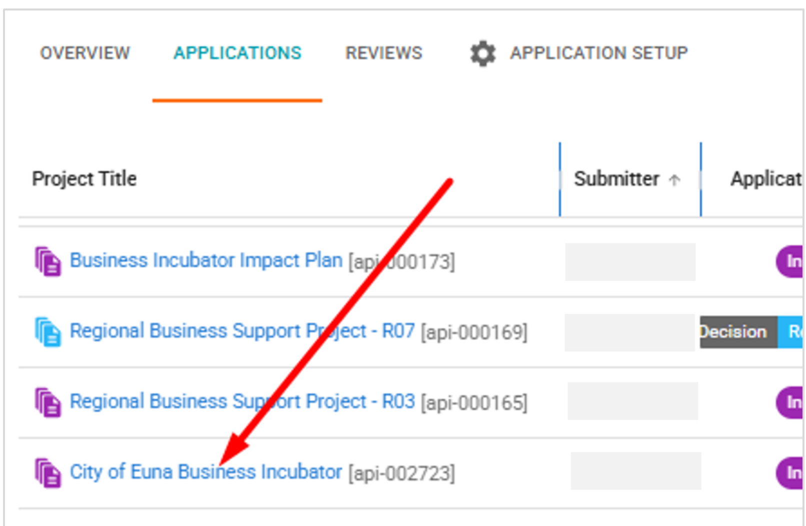


| | F | G | H | I | J | K | L |
|---|---|---|---|---|---|---|---|
| 1 | ıster rev | Review for | Reviewer | Status | Addresses | Priority Ar | Addresses |
| 2 | oject Inf | rfi-000434 | John Doe | Completed | 10 | | 9 |
| 3 | oject Inf | rfi-000435 | Jane Doe | Completed | 10 | | 8 |
| 4 | oject Inf | rfi-000458 | Jane Doe | Draft (reo | 9 | This proje | 1 |
| 5 | oject Inf | rfi-000496 | John Doe | Not Started | | | |

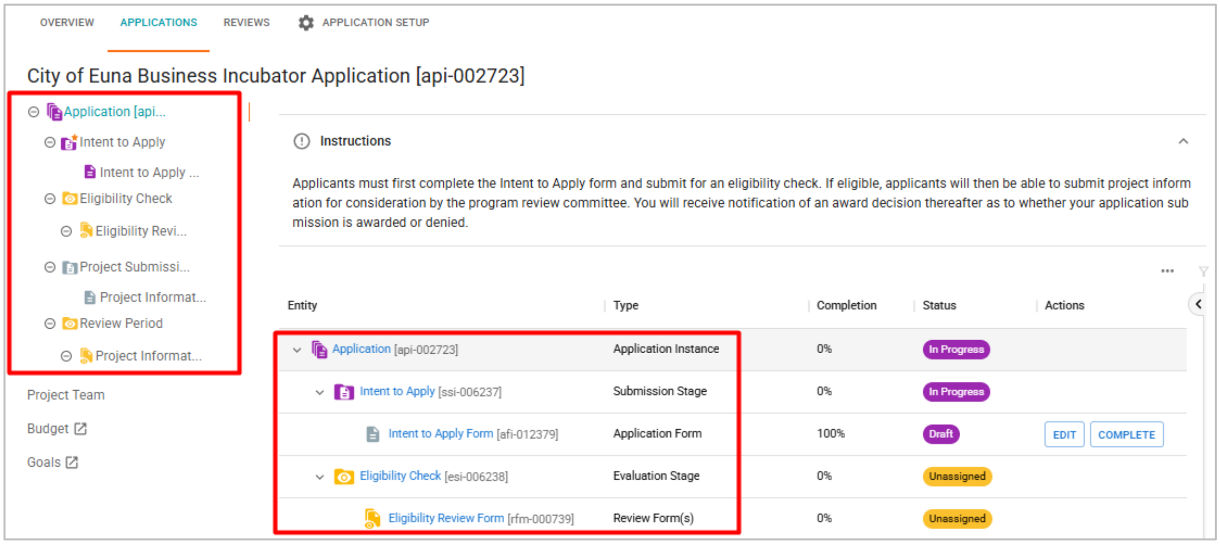
## View Individual Application Submissions

Under the Applications heading, click any Submission title to open its contents



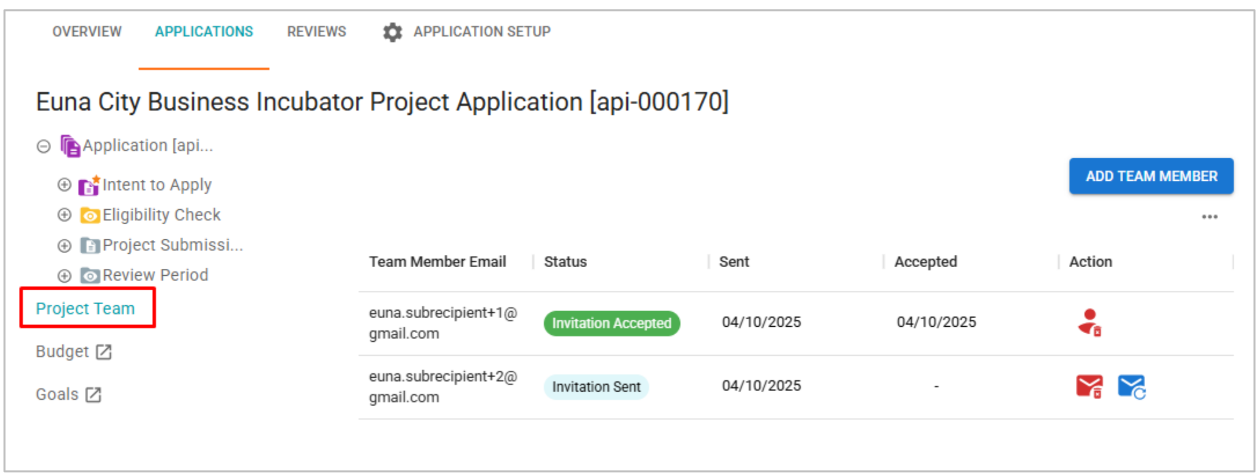
## Navigating the Application Process

After opening a Submission, you will be taken to the expanded view of the entire Application Process for that Submission. Click any hyperlinked stage or form name to open its contents. Use the links in the left-hand bar to return back to this page or any other part within the Application Process



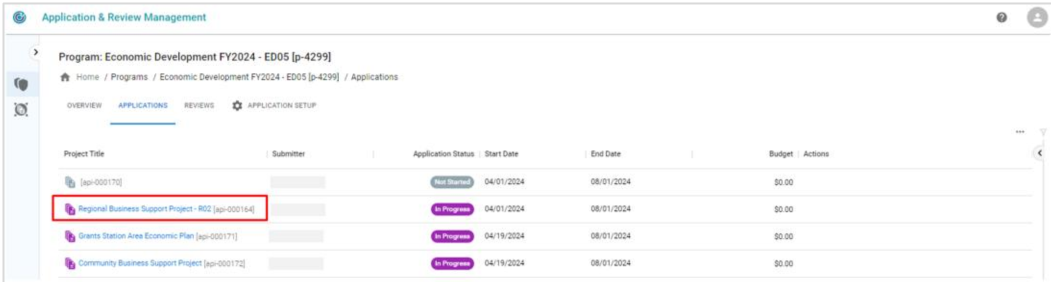

## Project Team

View and manage all Team Members that you or the Applicant have invited to the Application.

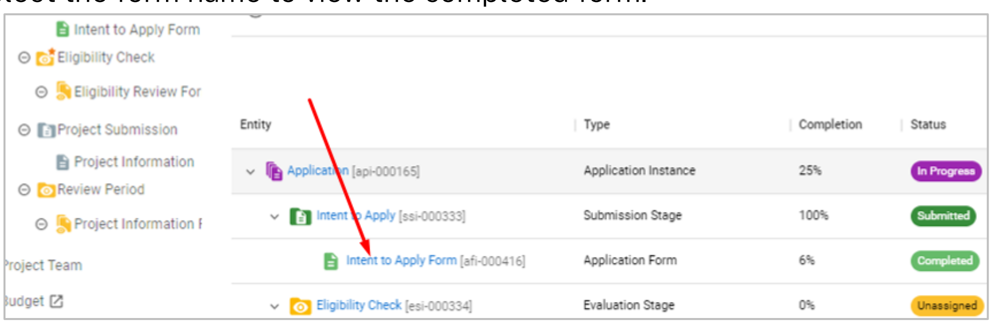


## Exporting a Completed Application Form

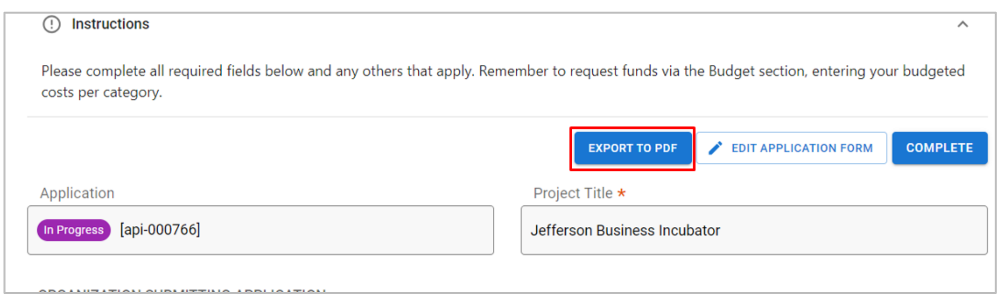
1. To export a PDF copy of a specific completed application form, select a Project Title from the Applications table.




2. Select the form name to view the completed form.

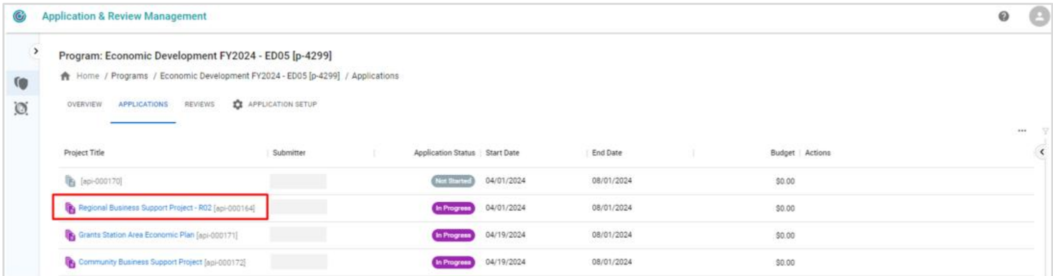



3. Click **Export to PDF**

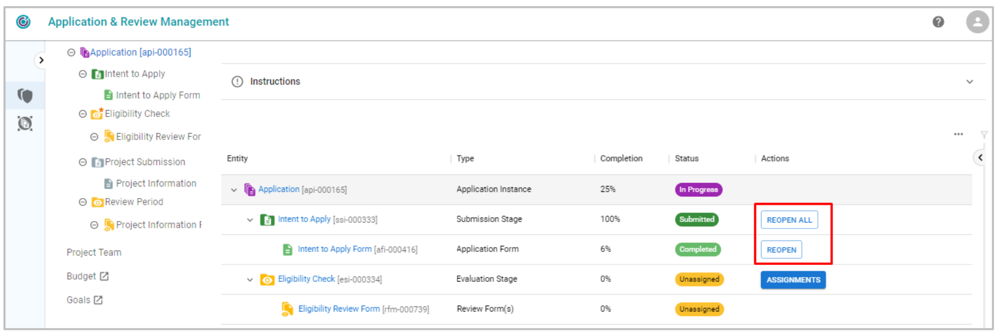


## Re-Open an Application

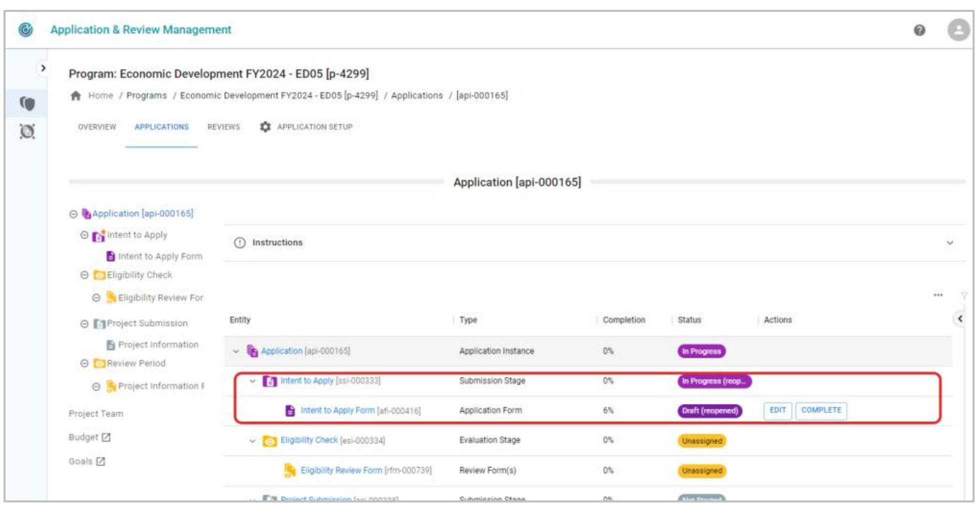
1. If a Grantor needs to Re-Open an Application, they will need to select the Application from the Applications Tab




2. You can Re-Open just one form or Re-Open All as seen below:




3. The status of each re-opened form will update to **Draft (reopened)** and the Submission Stage will update to **In Progress (reopened**). Applicants may then continue editing.



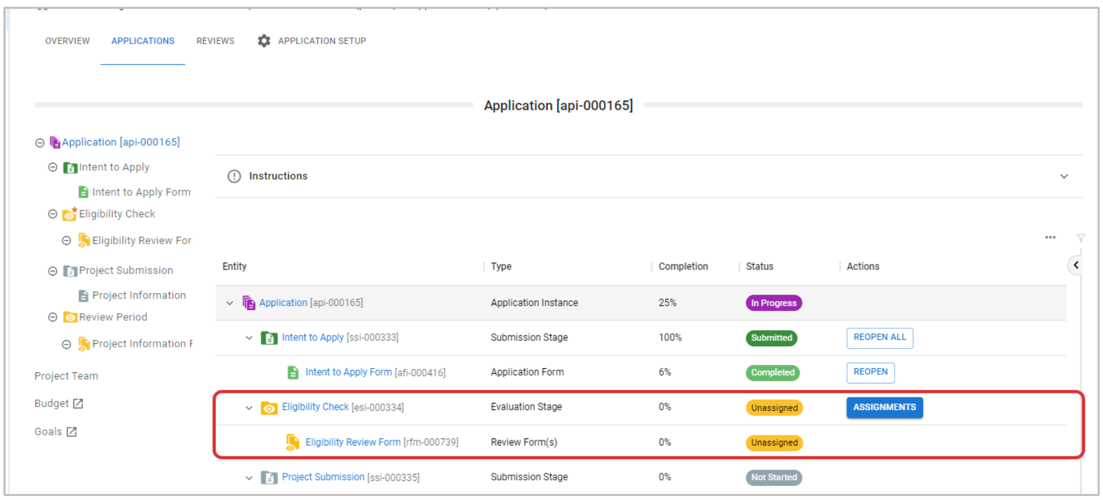
# Managing Reviews

## Assign Reviewers to Applications

The below instructions will walk through how to assign reviewers to all applications where the Submission Stage has been completed and an Evaluation Stage has been opened.

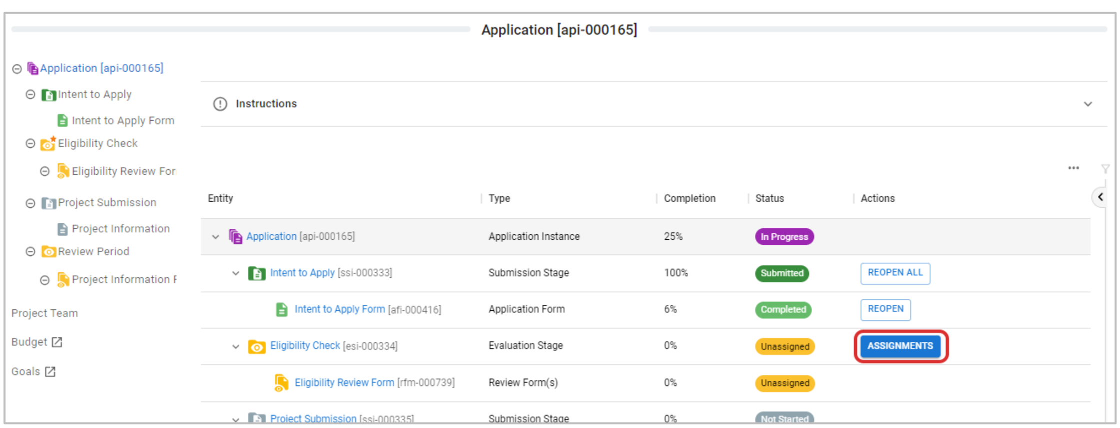
Reviewers can be assigned one of two ways:

1. By Application Instance — while viewing a specific application and assigning one by one
2. Bulk Assign — by clicking the Reviews tab above and using the Bulk Assign feature.

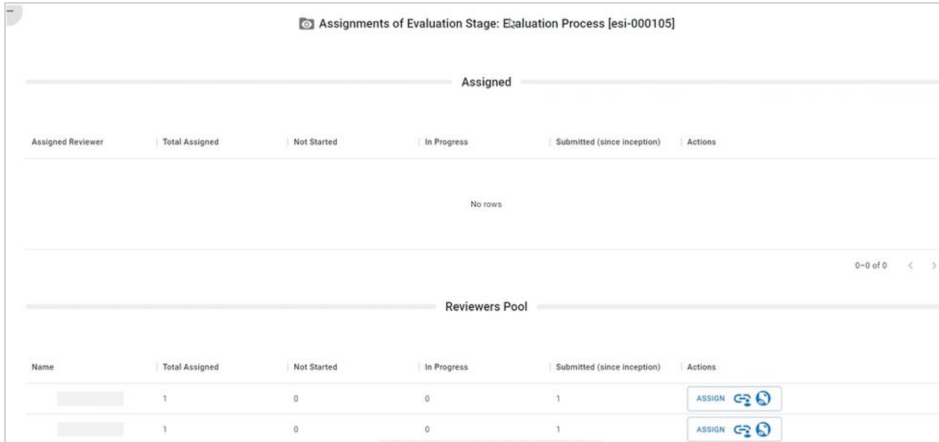



### By Application Instance

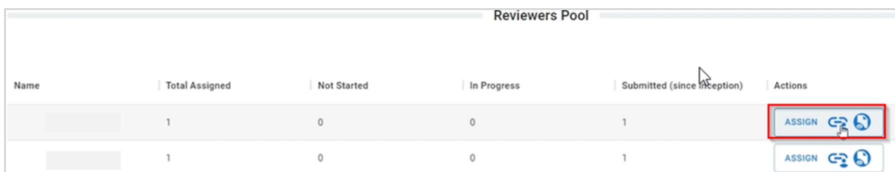
1. On the Evaluation Stage, click on the **Assignments** button to assign reviewers.



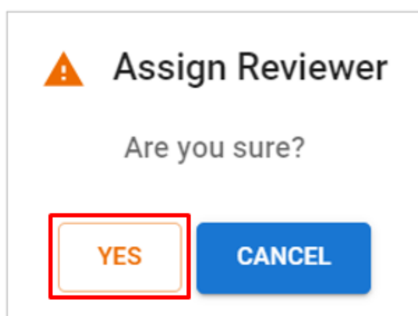
2. The Assignments of Evaluation Stage: Evaluation Process page will now open. You can see who is Assigned and who is listed on the Reviewers Pool.



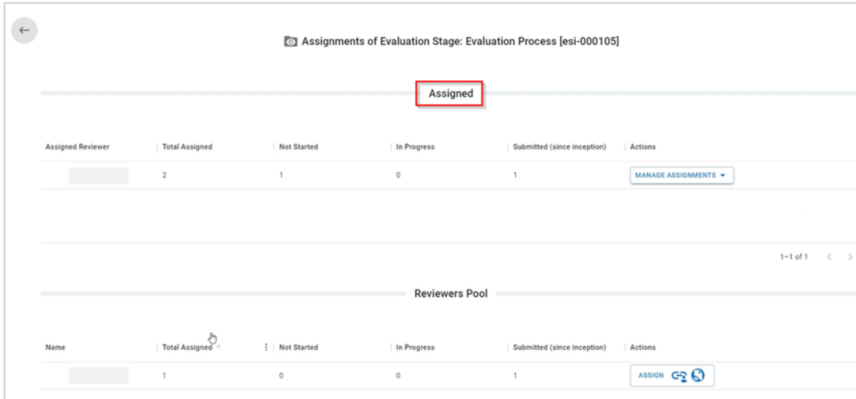

3. Click the **Assign** button next to each Reviewer that must complete Review Forms for this Application.



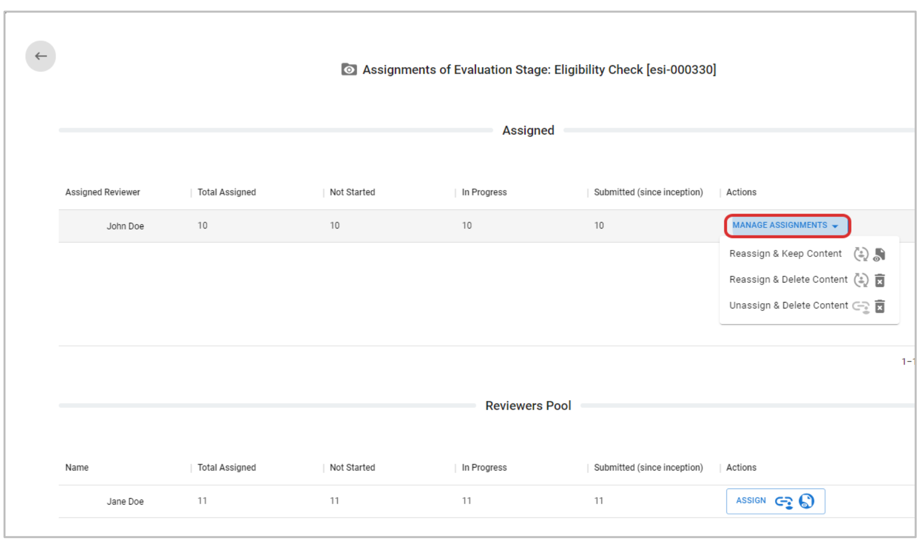

4. Click **Yes** to confirm.



5. You can now see how the Reviewer was added to the Assigned section of the table below:

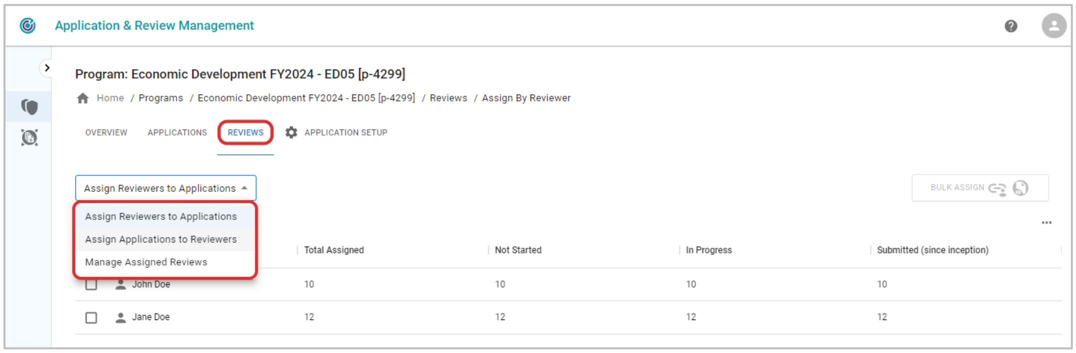



6. You can also Manage Assignments for each Assigned Reviewer by simply clicking on the **Actions** column under the Assigned section of the table. You will have 3 options as listed below:
    a. Reassign & Keep Content: Move the assignments and review form content to another Reviewer account.
    b. Reassign & Delete Content: Move the assignment to another Reviewer account but delete the review form content.
    c. Unassign & Delete Content: Remove the assignment from this Reviewer and delete any review form content created by this Reviewer.

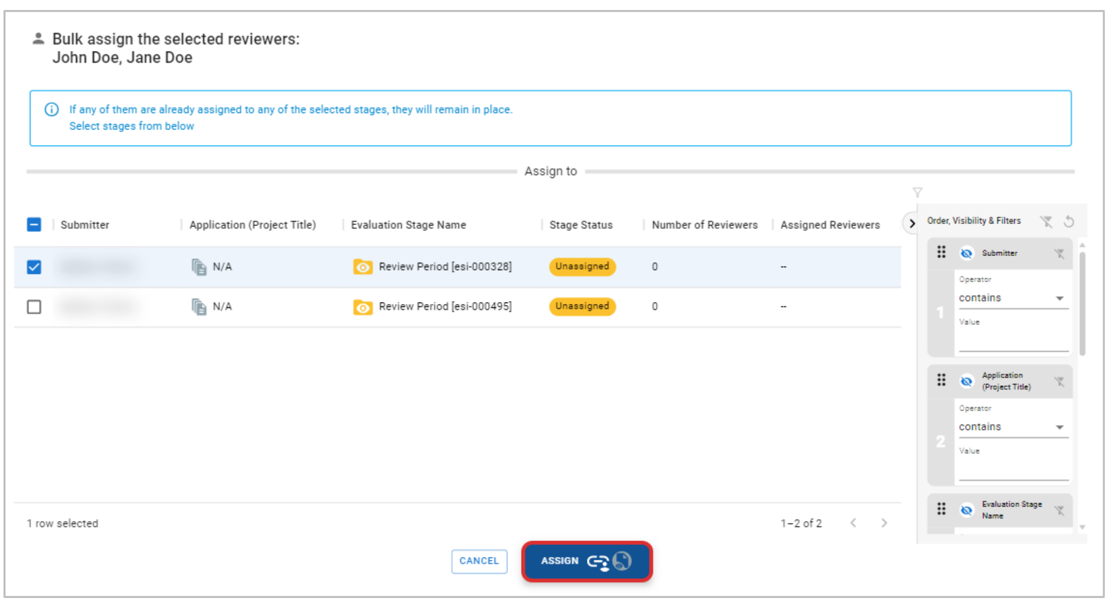


## Bulk Assign

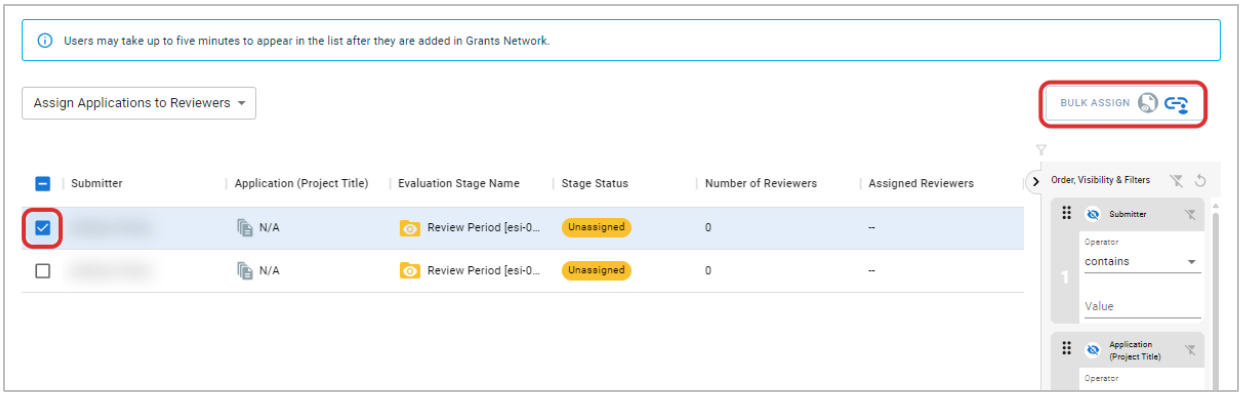
1. Open the Reviews Tab and select an assignment method from the dropdown.

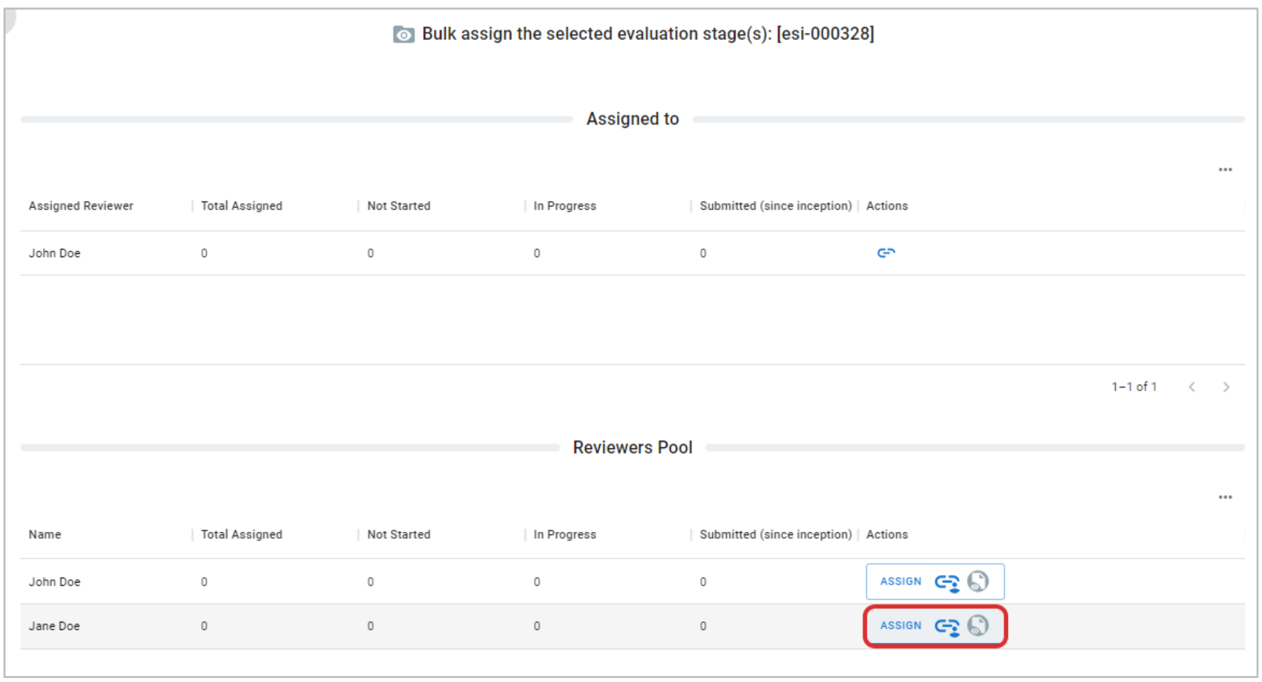



2. Bulk Assigning can be performed in one of three ways as described below:
   a. Assign Reviewers to Applications:
      i. Select the Reviewer names desired
      ii. Click **Bulk Assign**
      iii. Select from a list of Applications (provided they have Evaluation stages ready for assignment)
      iv. Click **Assign**

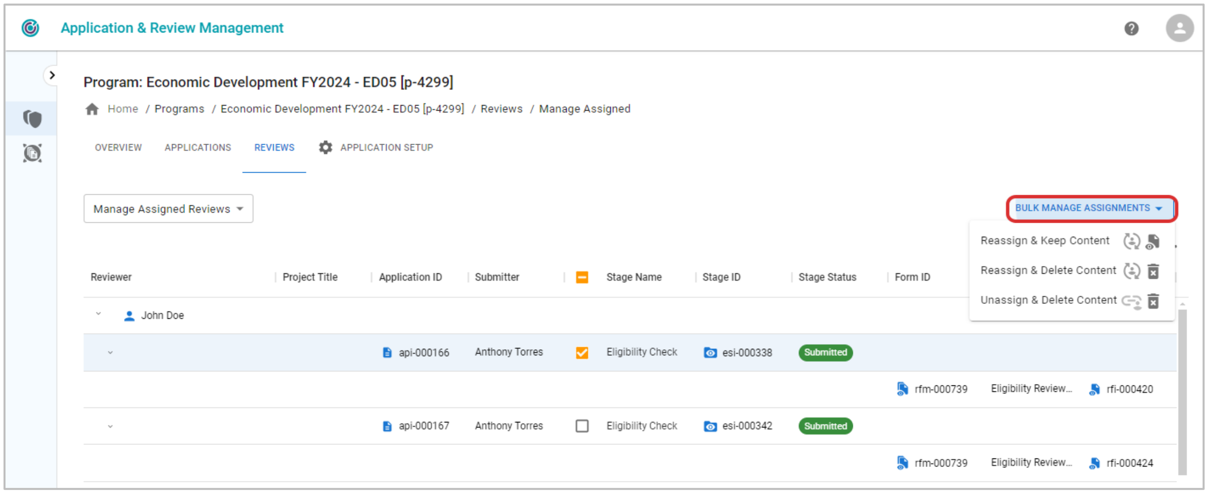



b. Assign Applications to Reviewers:
   i. Select the Applications desired (provided they have Evaluation stages ready for assignment)
   ii. Click **Bulk Assign**
   iii. Select the Reviewer names desired
   iv. Click **Assign**



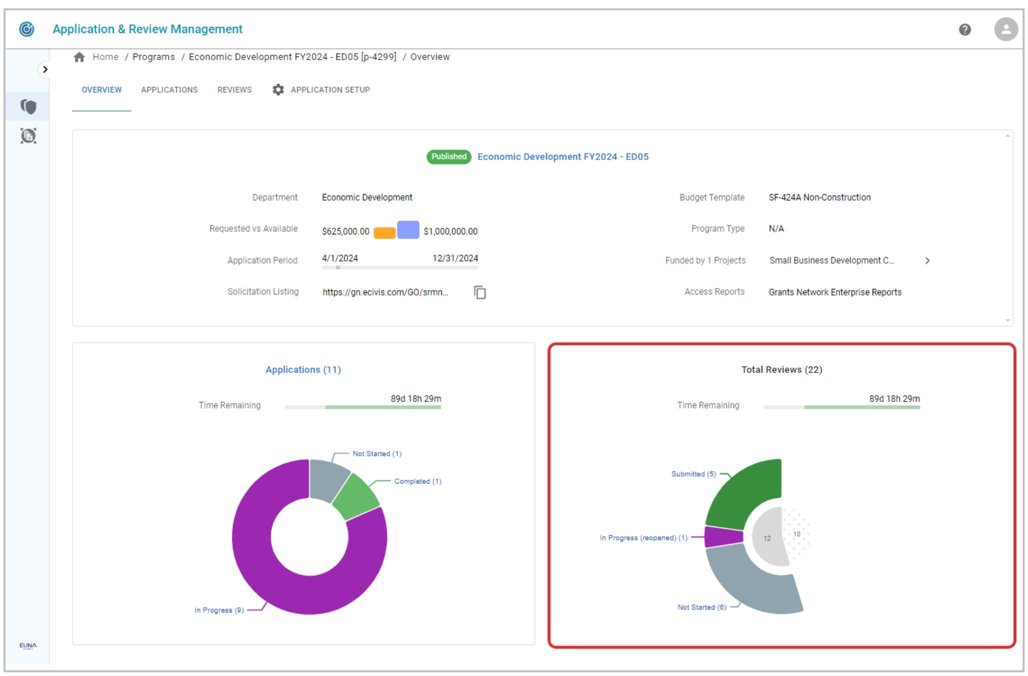



2. Manage Assigned Reviews: View all assignments made and reassign or unassign using the **Bulk Manage Assignments** button.




## Monitoring Reviews

1. Use the Total Reviews chart to track the statuses and time remaining for all Reviews.



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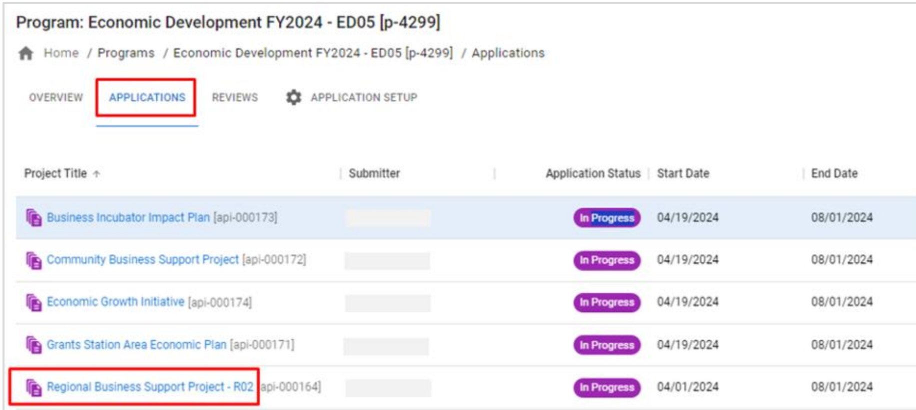
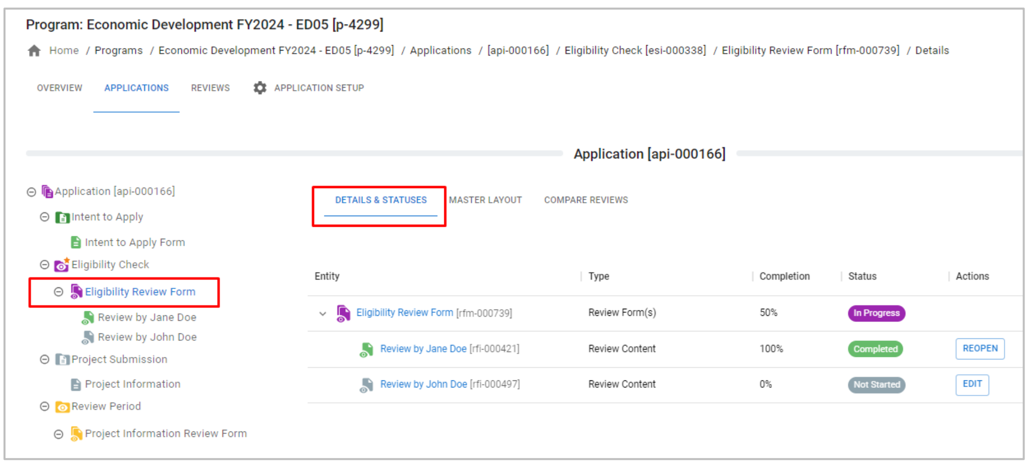
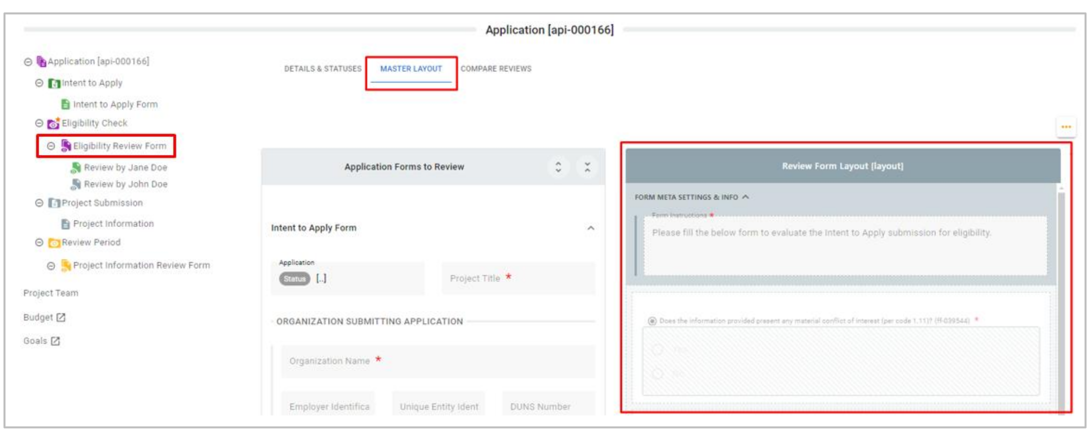
2. Click the **Applications** tab up above and open a specific Application to monitor the status of its Reviews.



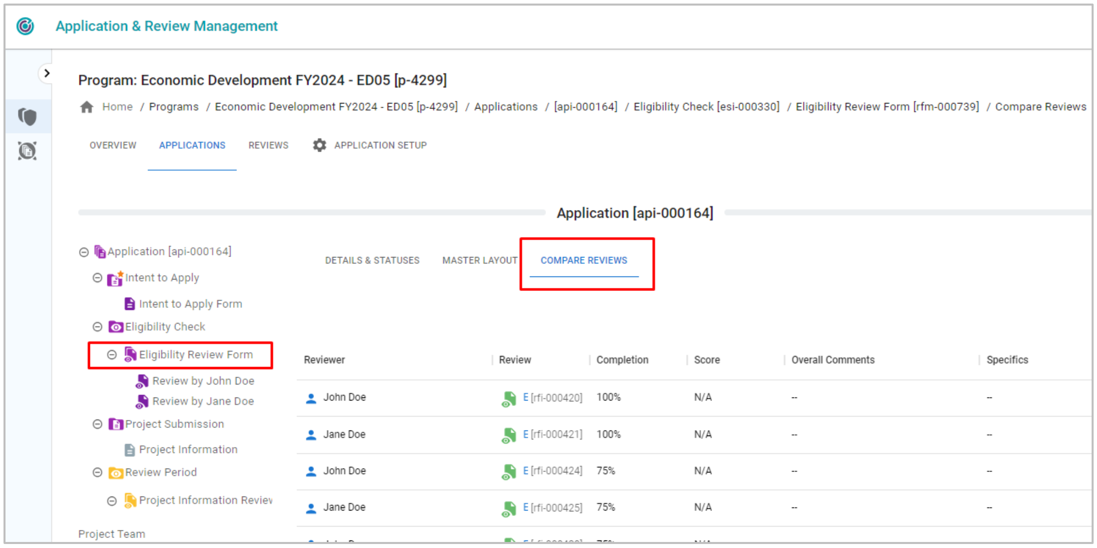

3. Click the Review Form in question using the navigation bar on the left. You will see the **Details & Statuses** page with a breakdown of the status on all assigned Reviewers for this Application.




4. Select the **Master Layout** heading to view the form's design.

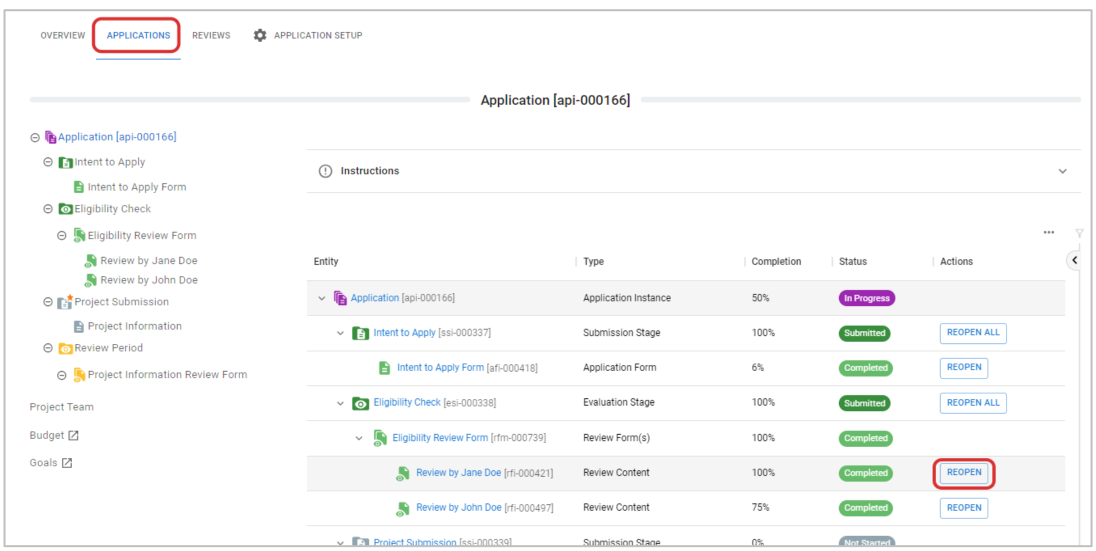


5. Select the **Compare Reviews** heading to view the status & details of reviews across all submitted applications within this Evaluation Stage.

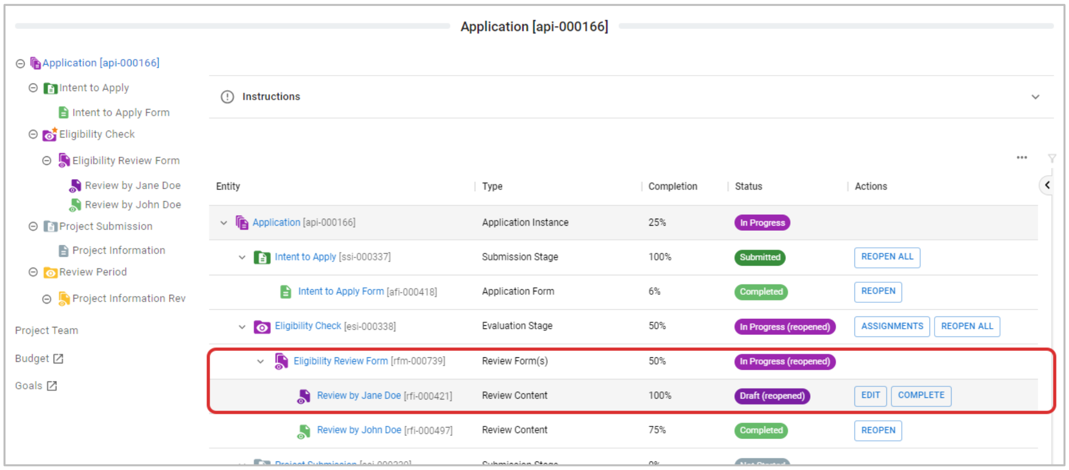



## Re-Open a Review

1. On the Applications tab, locate the Review marked Complete and click the **Review** button.



2. The status will update to **Draft (Reopened),** and the Reviewer will be able to make further edits and Complete.



# Reviewer Experience

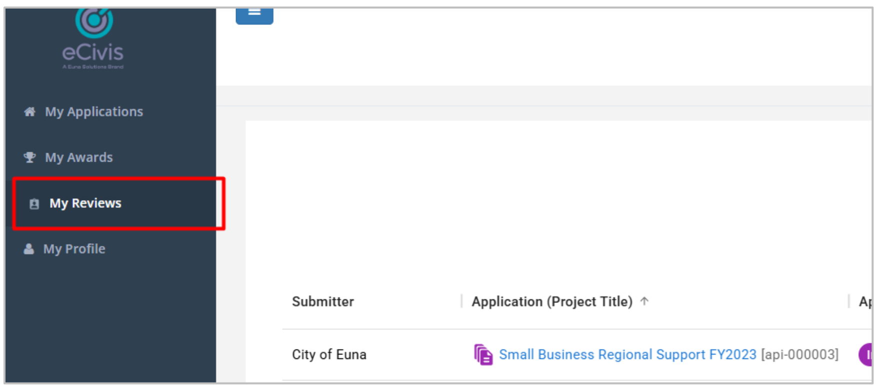
The sections below will discuss how a Reviewer will access and complete their Review Forms. The access point depends on whether the Reviewer is external to the Program team or part of the Program team (having access to the ARM dashboards).

## Completing Review Forms within eCivis Portal

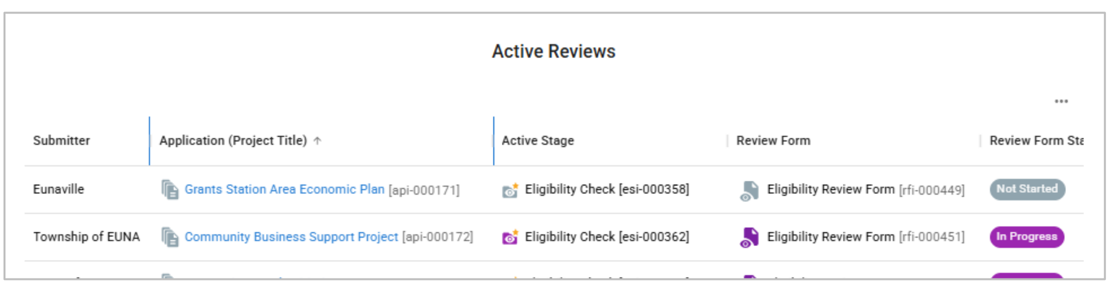
Third-party Reviewer committees or any Reviewers that are invited from outside of Grants Network will complete their Review Forms via portal.ecivis.com.

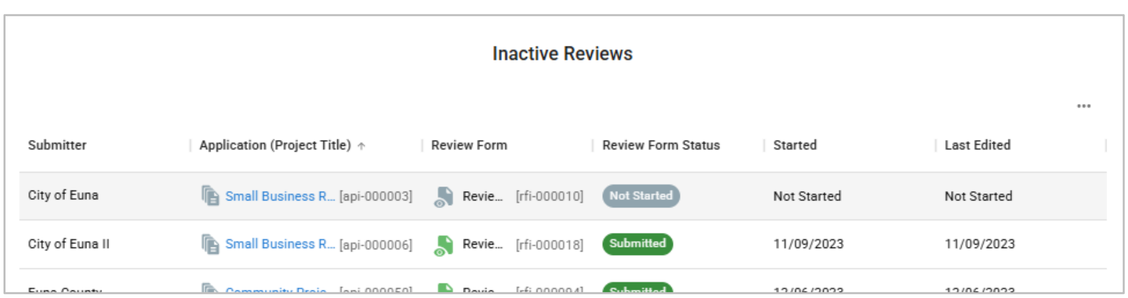
See “Applicant Experience in eCivis Portal” above for instruction on how Portal users create a new account and profile.

1. In Portal, locate the My Reviews selection from the left-hand navigation bar.

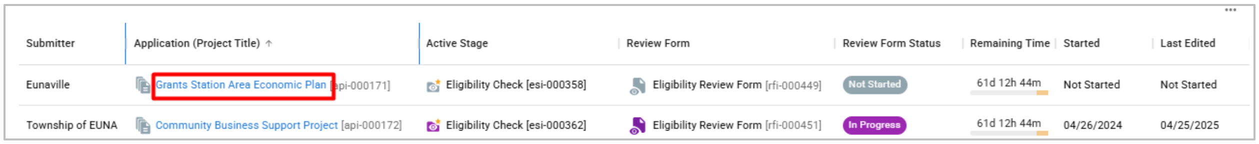



2. Your Active Reviews will show all open Evaluation Stages that require your attention, while the Inactive Reviews table beneath it will show your previously completed reviews and/or closed Evaluation Stages.

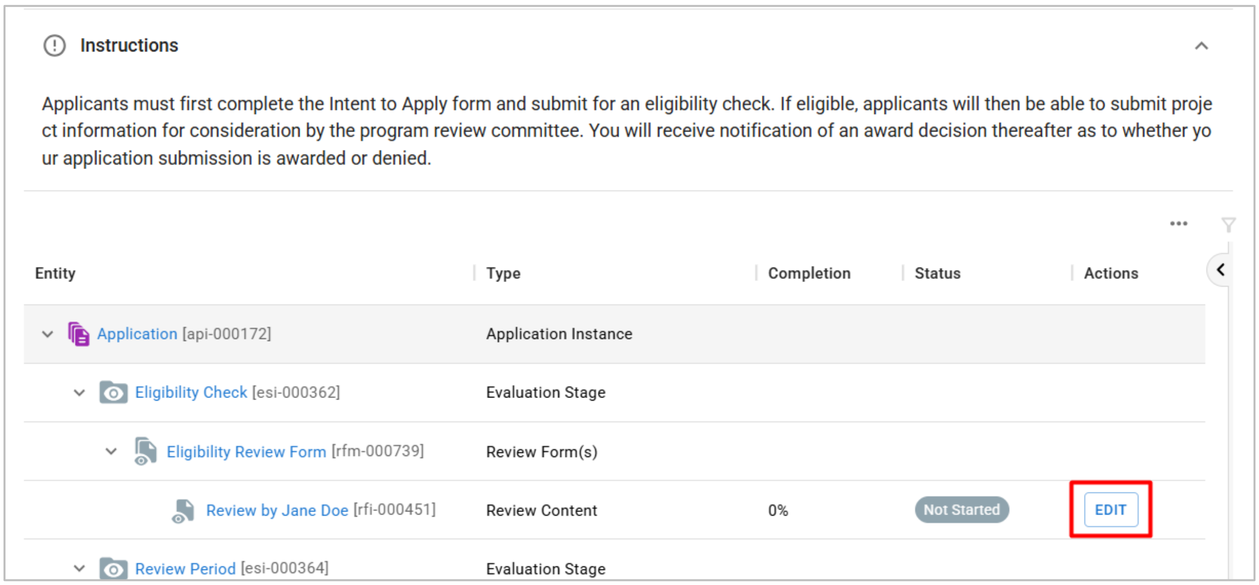


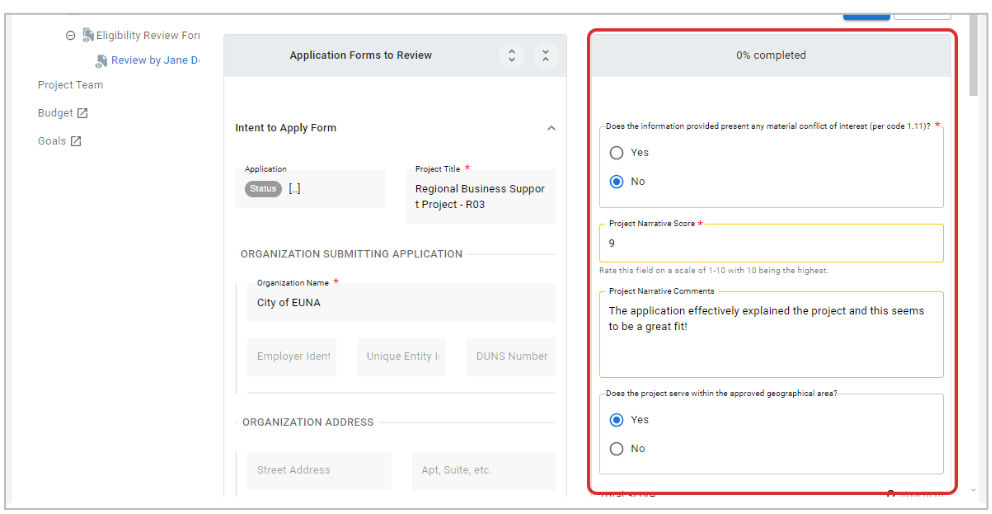
3. Click on the Application ID you wish to review. The stage status will show **Not Started** unless you have saved your review for later, triggering the **In Progress** status.



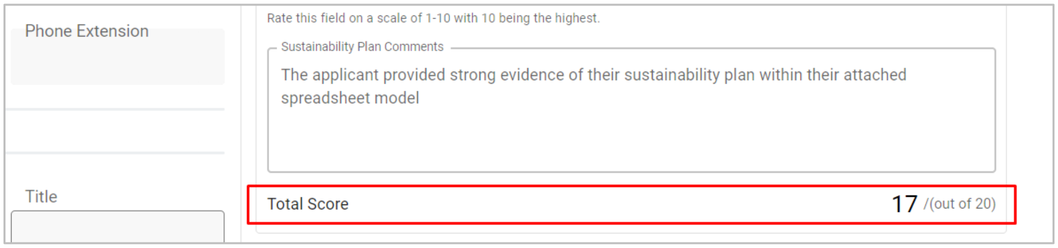

4. Click **Edit** next to the Review Form you need to fill.



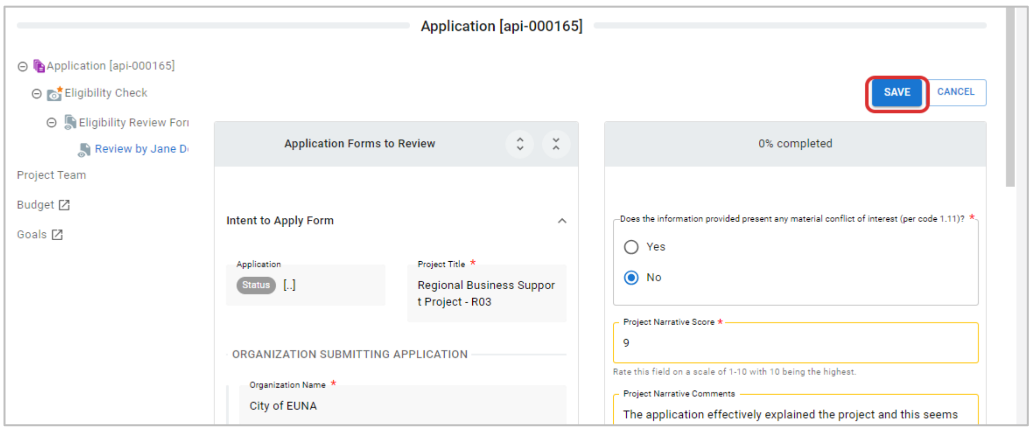

5. Viewing the **Application Forms to Review** on the left-hand side of the screen, Reviewers will provide feedback using the field on the right.



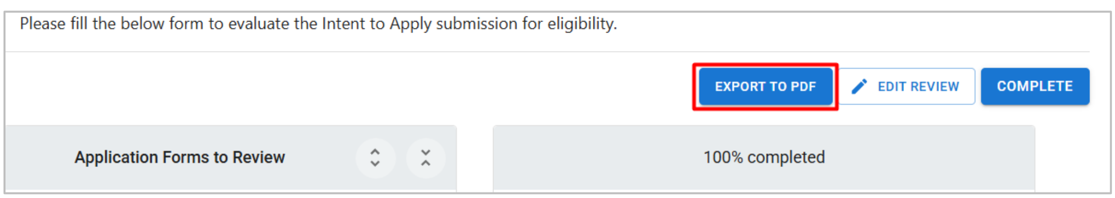
*Note: If the Review Form is built with scoring fields that add up to a total score, you will see the **Total Score** value at the bottom of the form.



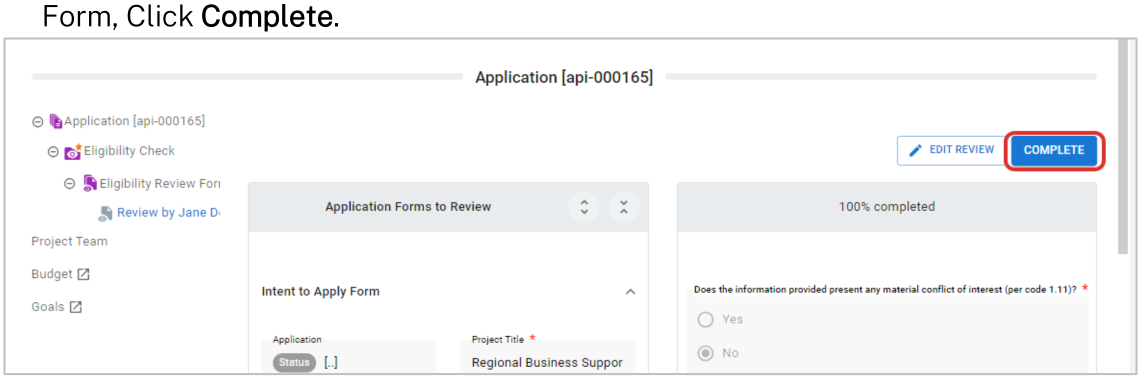

6. Click **Save** once edits are complete.




*Note: To export a copy of the filled Review Form to PDF format, click **Export to PDF** from the top-right corner of the page



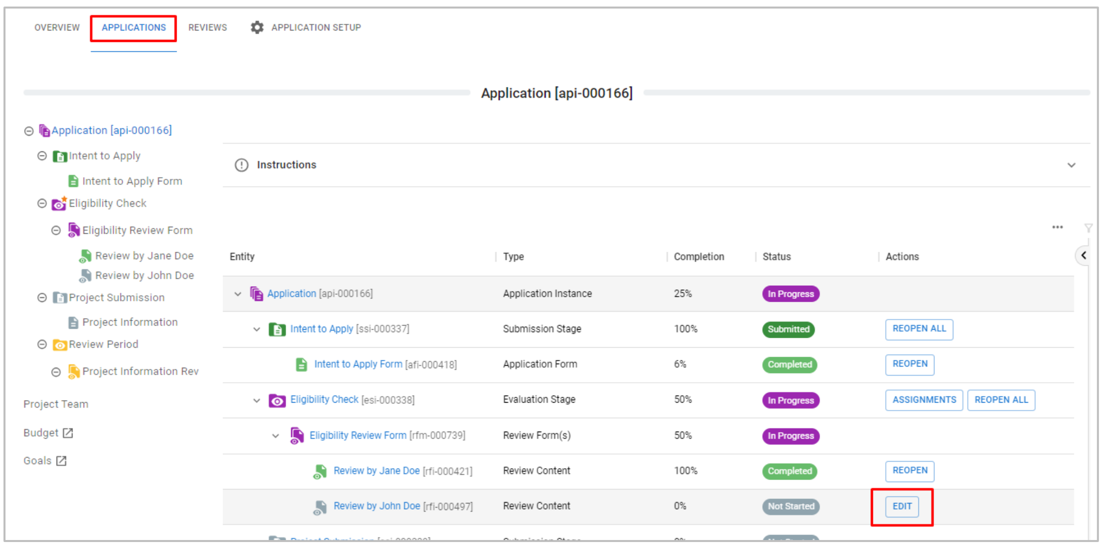

7. If no further edits are needed and you are ready to submit the completed Review Form, Click **Complete.**



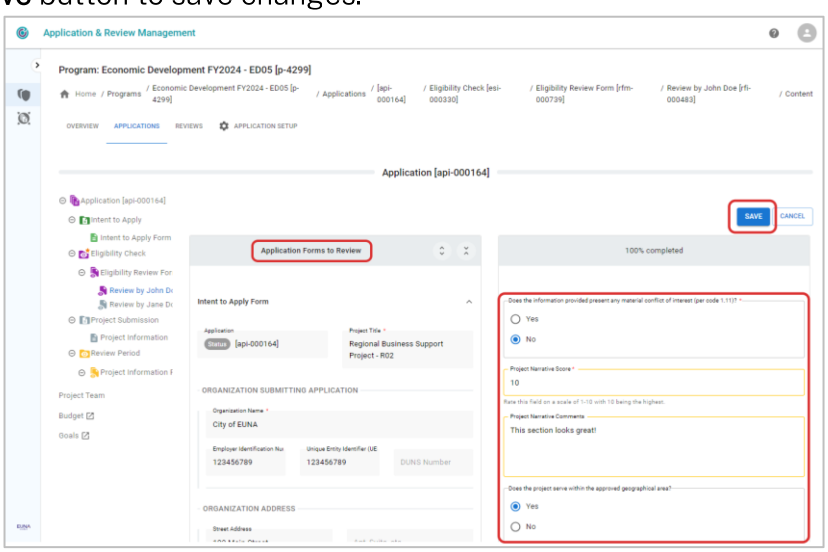
8. The review will appear in your My Reviews list under the Inactive Reviews with a status of **Submitted**.


## Completing Review Forms within the Application and Review Manager

1. Edit Review Form - As a Reviewer, if you are working in the organization and have access to Grants Network you do not have to go into the Reviewer Portal in eCivis Portal. Simply clicking on the Edit Button here will allow you access to the Reviewer Form and you can fill out.



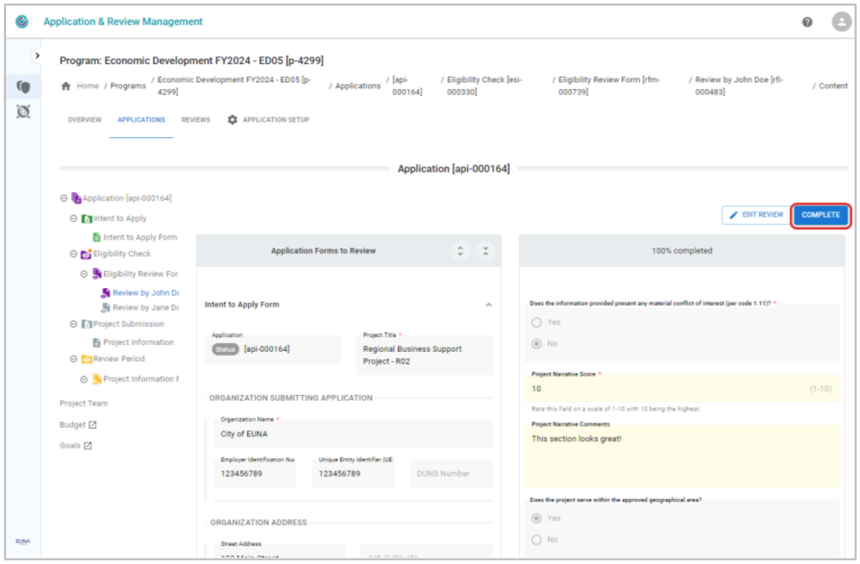

2. Click the **Save** button to save changes.



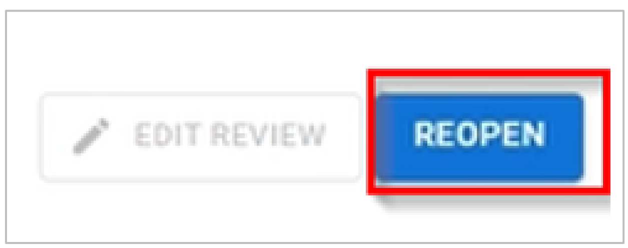



EUNA Grants

3. Click the **Complete** Button when ready to submit.



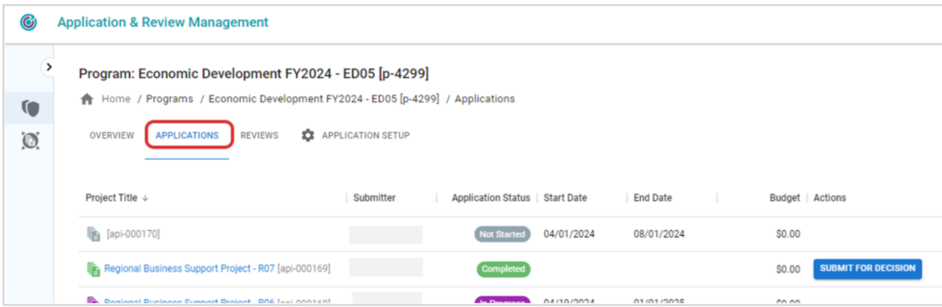

4. Once you click on the Complete button a **Reopen** button will appear if you need to make further edits.



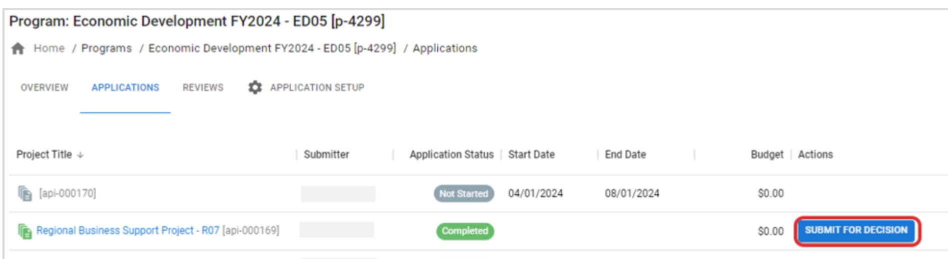
# Decisions

## Decision Options

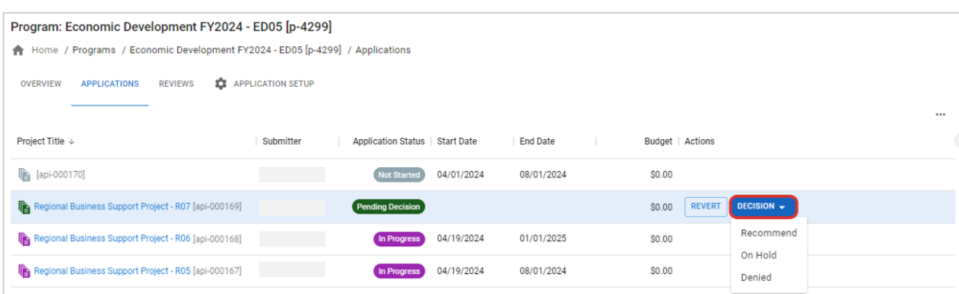
1. When the stages of the Application Process have been completed on any given Application (e.g. Reviewers finish submitting Reviews for the final Evaluation Stage), a **Submit For Decision** button will appear next to that Application title when viewing the Applications page.




2. Click **Submit For Decision** to access the decision options.

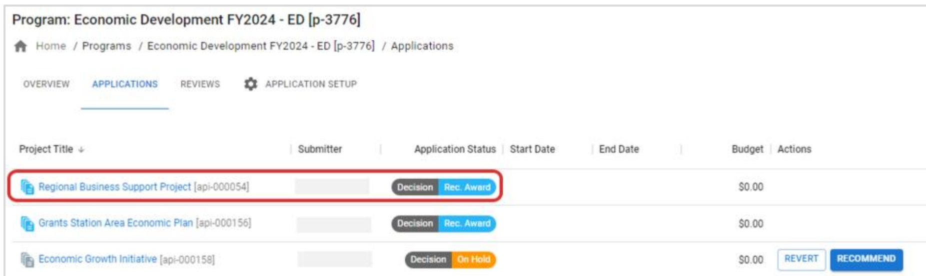



3. The status of that Application will update to **Pending Decision,** and you will select from one of the three below:

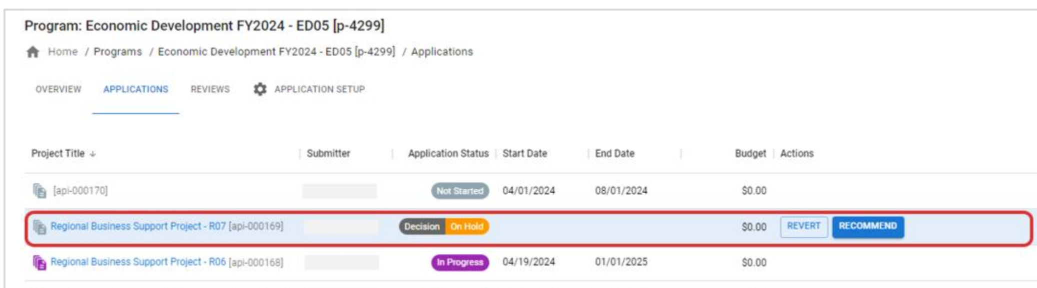


a. Recommend: The application will be recommended for award. See the next section titled “Processing Awards” for further instruction on creating the Award Package and having it approved.

*Note: This selection cannot be reverted. All decision options will disappear from the Actions column. However, the recommendation can be rejected once submitted for approval within the Program Detail Page.

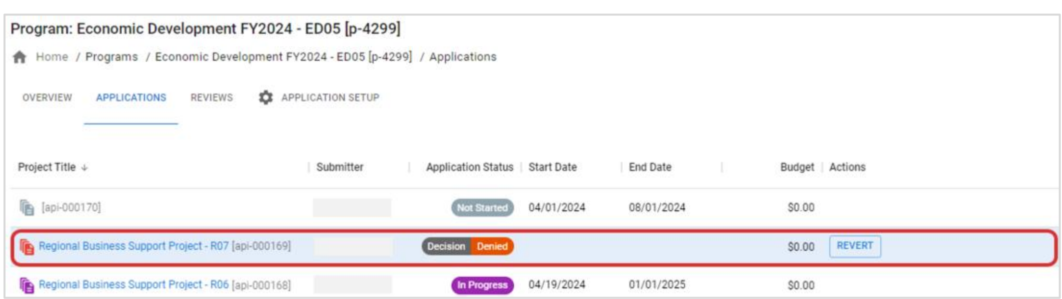



b. On Hold: A final decision (i.e. Denied or Recommended) will be selected at a later time. From this status, you may select Recommend or, to deny, you must click **Revert** to reveal the Denied option.




c. Denied: The application will be denied for award.

*Note: To undo this selection, click **Revert**.

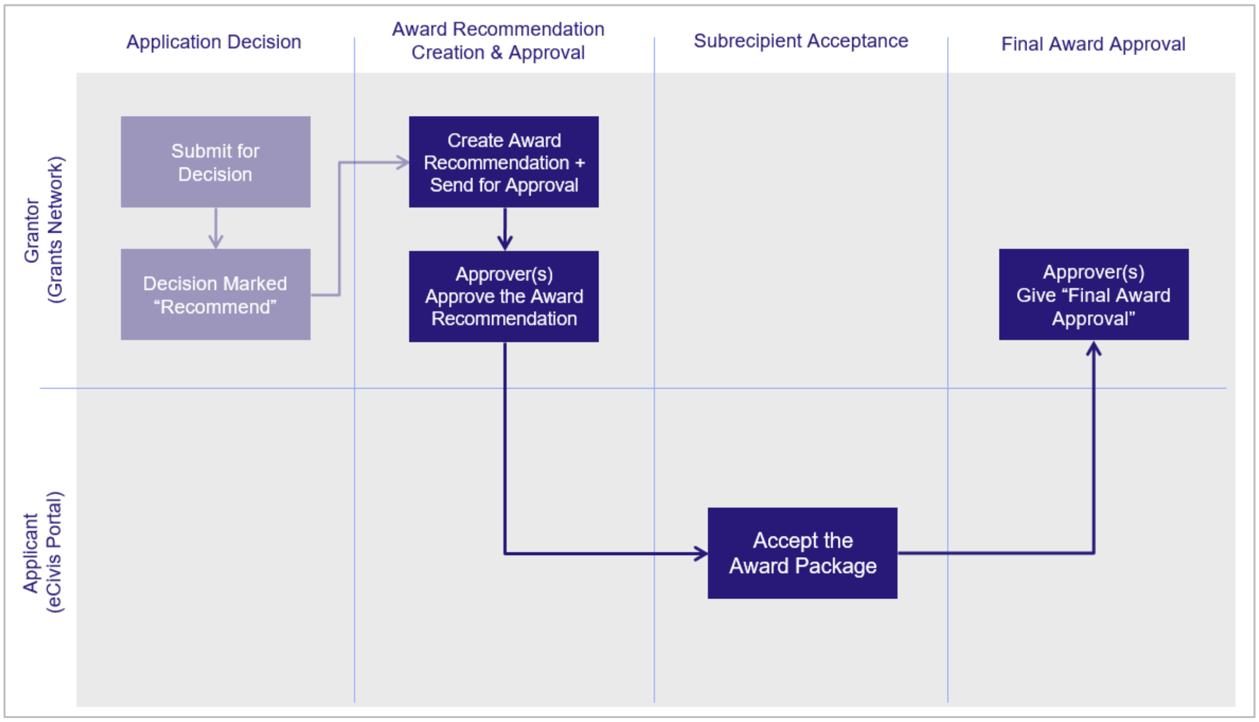


## Processing Awards

Selecting **Recommend** from the Decision options is the first step to processing an award for an applicant. This section will walk through the remaining steps of this process:

1. Creating the Award Recommendation (aka "Award Package") and sending it for approval
2. Internal approval of the Award Recommendation
3. External (Applicant) approval of the Award Package
4. Internal approval of the Final Award Package

Below is a diagram of these steps:

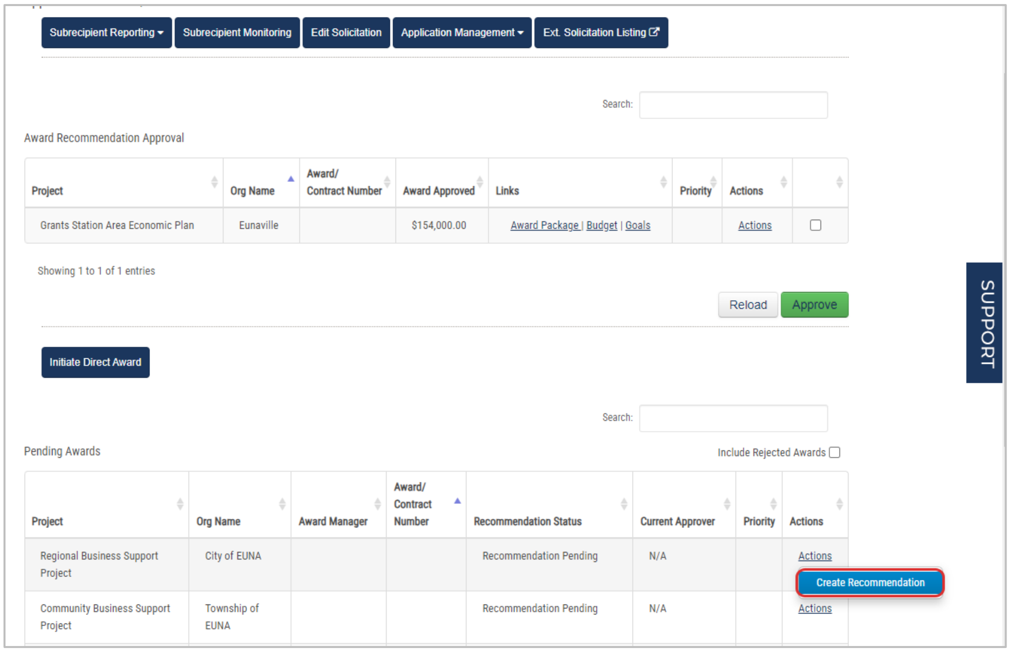



*__Note:__ Approvers for the Recommendation Approval and Final Award Approval are set in the Edit Solicitation page (See the "Editing the Solicitation" section of this guide.)

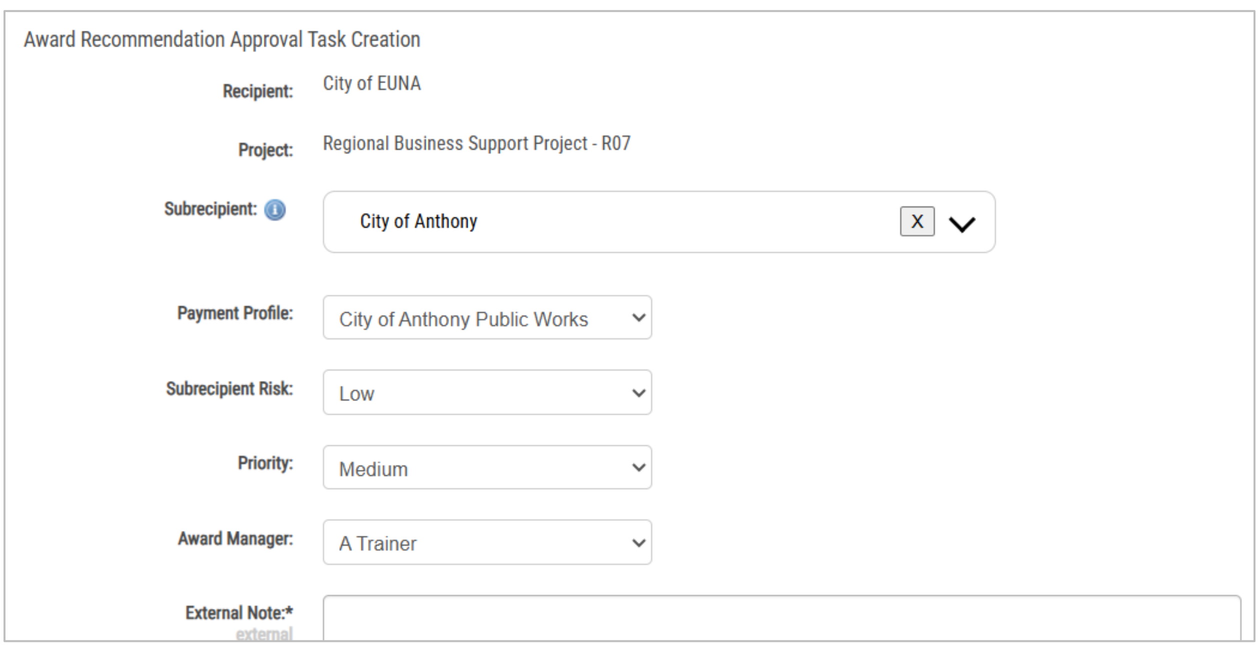
## Award Recommendation: Create and Send for Approval

1. All applications marked for Award Recommendation will appear on the Pending Awards table of the Program Detail page.

   Click **Actions** > **Create Recommendation.**




2. Fill the details of the Recommendation:



a. Subrecipient: If Subrecipients have been built into your Organization's account, choosing one here will associate this recommendation with that organization (Organization Master Account Holders can manage this at Administration > Organization Library > Subrecipients). Once a Subrecipient is selected, an available payment profile can be chosen as well. If a Subrecipient needs to be removed, select N/A from the Subrecipient list.

b. Payment Profiles: Some Subrecipient records contain payment profiles to specify a department or office within the organization to receive funds.

c. Subrecipient Risk: Select a risk level to display on this award (displays internally only.)

d. Priority: Select a priority level to display on this award (displays internally only.)

e. Award Manager: Select an Award Manager from the list of users to display on this award (displays internally only.)

f. External Note [Required]: A note that will display to the potential subrecipient once the award recommendation is approved and sent to them.

g. Internal Note [Required]: A note that will display to approvers and internal team members as the award recommendation is approved and stored.

h. EIN: Employer Identification Number

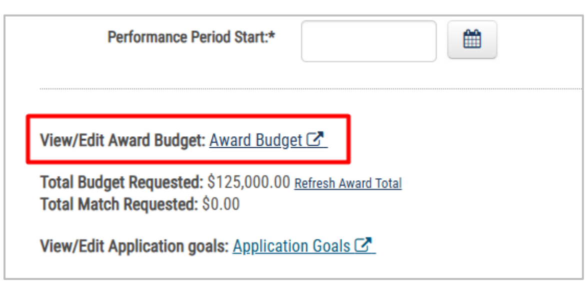
i. Award/Contract Number: A unique number to identify this subrecipient award.

j. PO Number: Purchase Order Number

k. Project Type: Labels the awarded project as "Construction" or "Non-Construction"

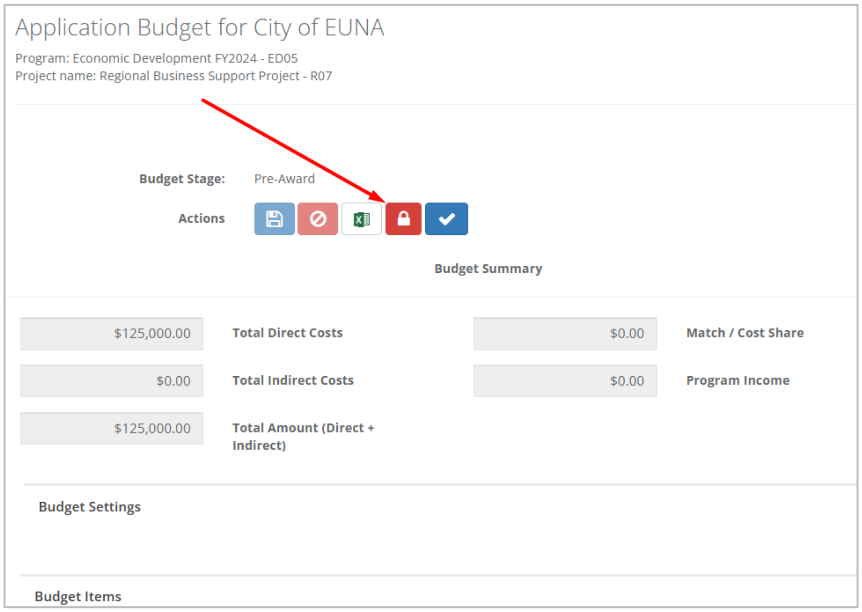
l. Performance Period Start/End Date [Required]: Indicates the award contract's period of performance

m. To view or edit the Budget submitted by this applicant, click **Award Budget**.



i. The Budget worksheet will open in another browser tab.

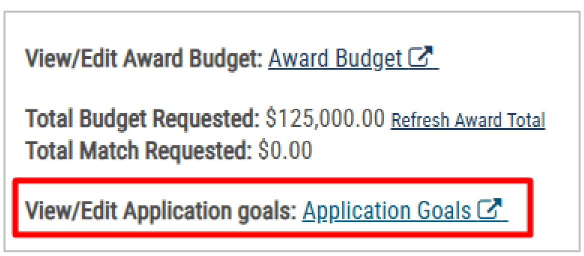
ii. If edits are needed, click the lock icon and edit the worksheet. [Refer to "Appendix D: Budget Worksheets" for more information on completing this worksheet]




iii. Be sure to click the **Save** icon when finished.

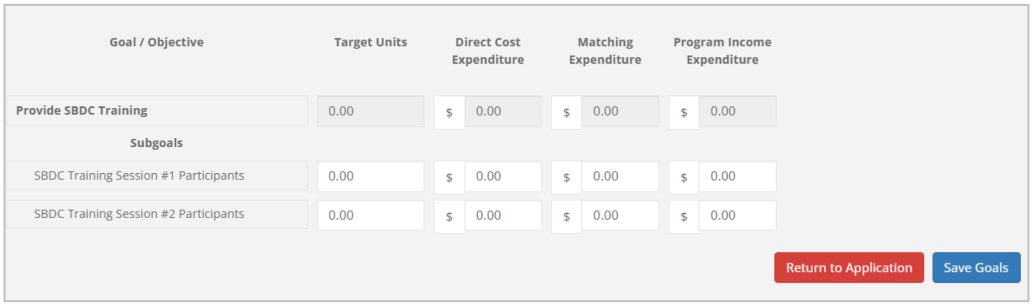
iv. Return to the previous browser tab when done

n. To view or edit the Goals submitted by this applicant, click **Application Goals**.



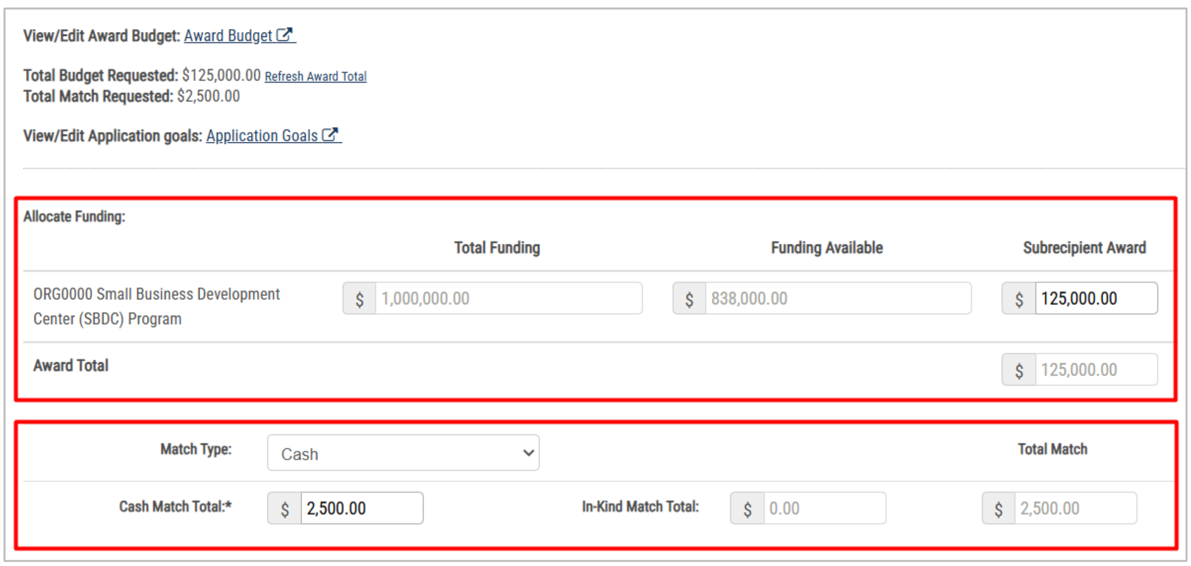

i. The Goals worksheet will open in another browser tab.

ii. Edit the target unit values, if necessary.

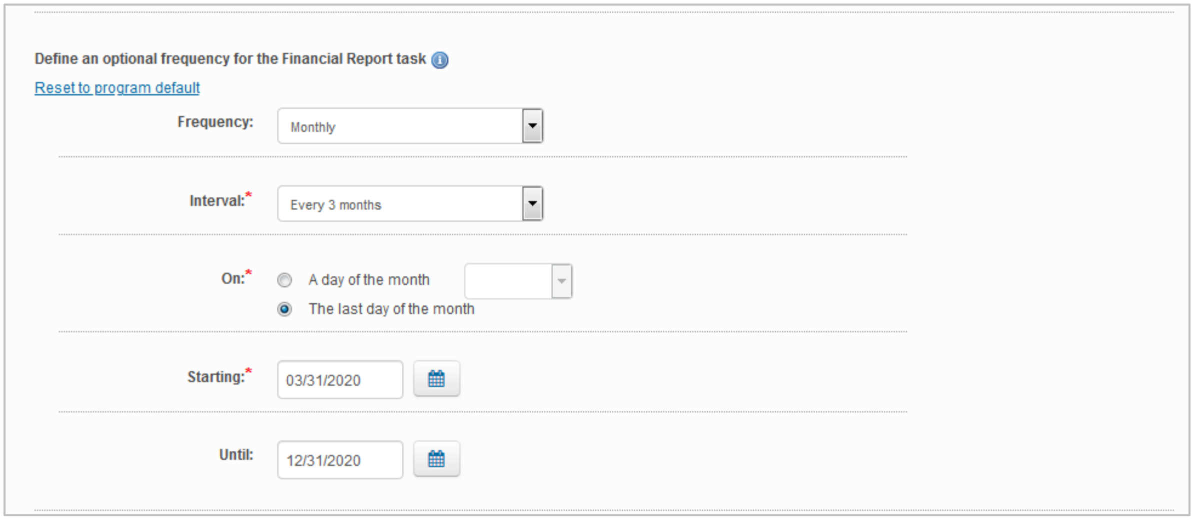



iii. Click **Save Goals** when finished.

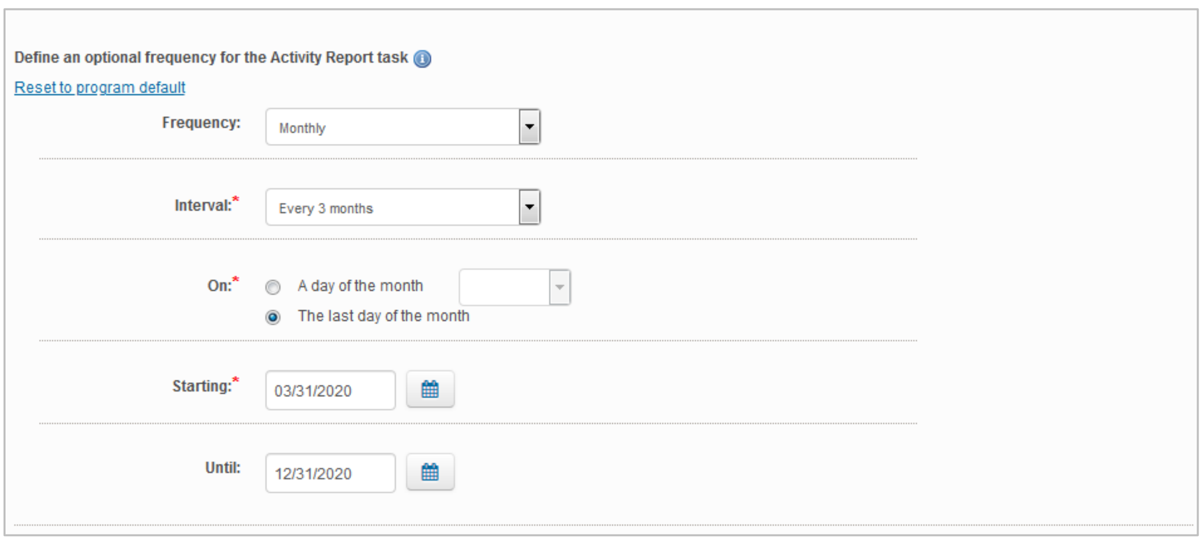
o. Allocate the budgeted award amount from the available funds in your program's funding sources [Required]. For example, for an award budget of $125,000, you will ensure that the amount allocated from all of the available funding sources adds up to $125,000. Repeat this action for the Total Match Requested, if any.



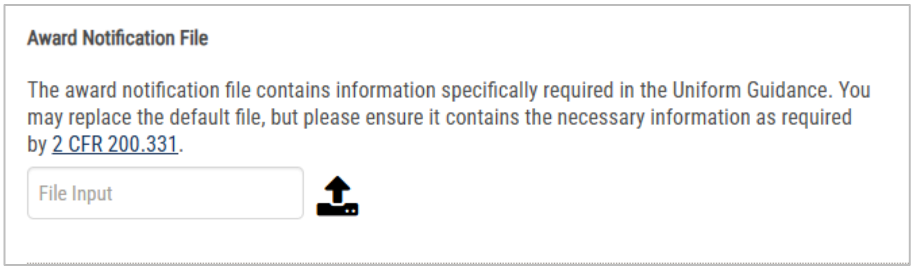
p. Confirm or redefine the Financial Report task schedule that you will assign to the subrecipient:



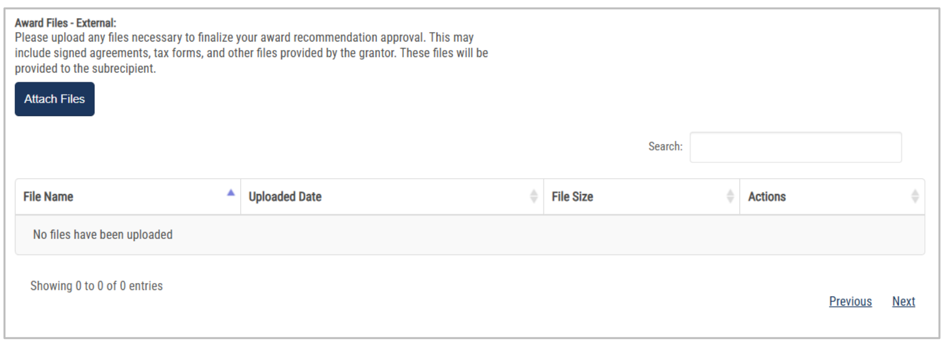

q. Confirm or redefine the Activity Report task schedule that you will assign to the subrecipient:



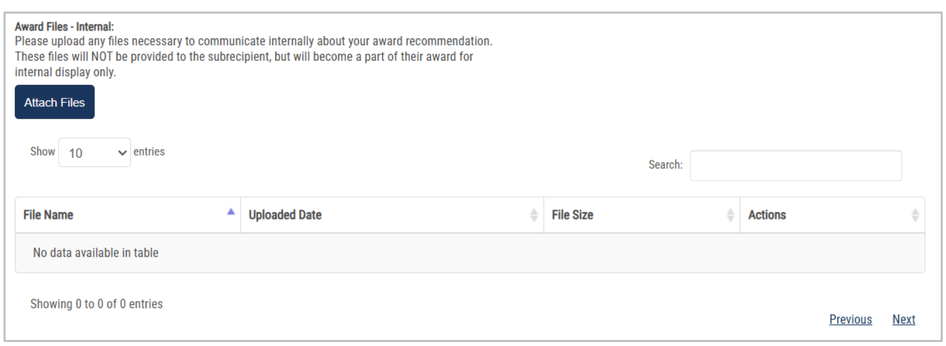
r. Award Notification File: Use this field to enter a custom award notification file in place of the default file, which will contain information specifically required in the Uniform Guidance. You may replace the default file, but please ensure it contains the necessary information as required by 2 CFR 200.331.



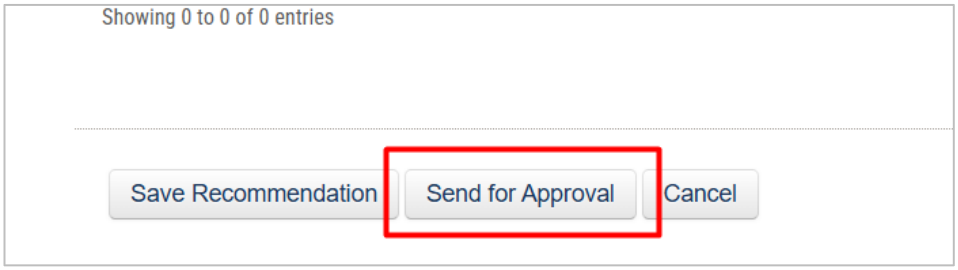

s. Award Files – External: Upload any files necessary to finalize your award recommendation approval. This may include signed agreements, tax forms, and other files provided by the grantor. These files will be provided to the subrecipient.




t. Award Files – Internal: Upload any files necessary to communicate internally about your award recommendation. These files will NOT be provided to the subrecipient, but will become a part of their award for internal display only.

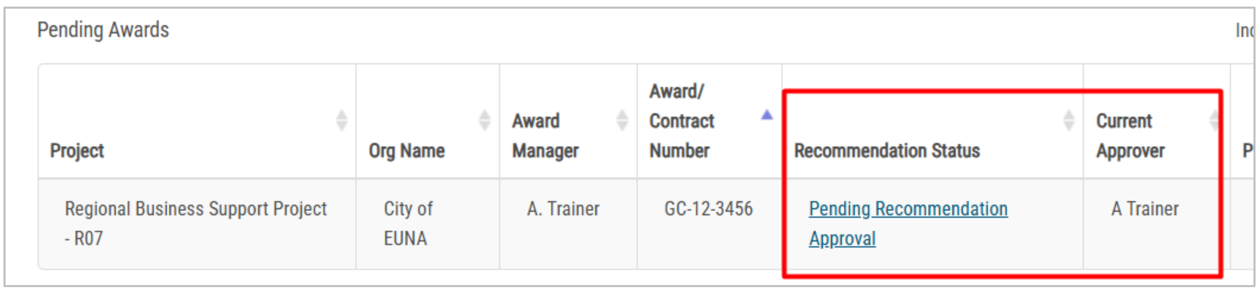


3. Click **Send For Approval**




*****Note:** To save and return to this recommendation. Click **Save Recommendation** and use the **Pending Awards** table as before to access this recommendation.

4. Click the hyperlinked Recommendation Status and view the Current Approver column in the Pending Awards table to view the progress of the approval (especially in the case of a sequential group approval).



Pending Awards

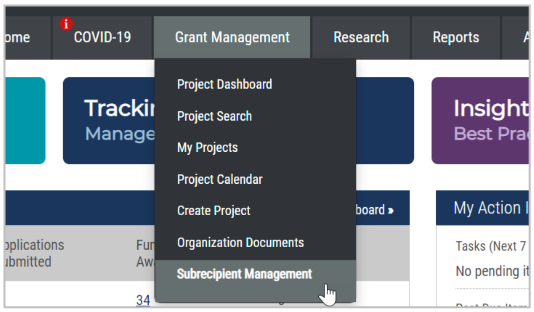
| Project | Org Name | Award Manager | Award/ Contract Number | Recommendation Status | Current Approver |
|---|---|---|---|---|---|
| Regional Business Support Project - R07 | City of EUNA | A. Trainer | GC-12-3456 | Pending Recommendation Approval | A Trainer |

## Approving an Award Recommendation

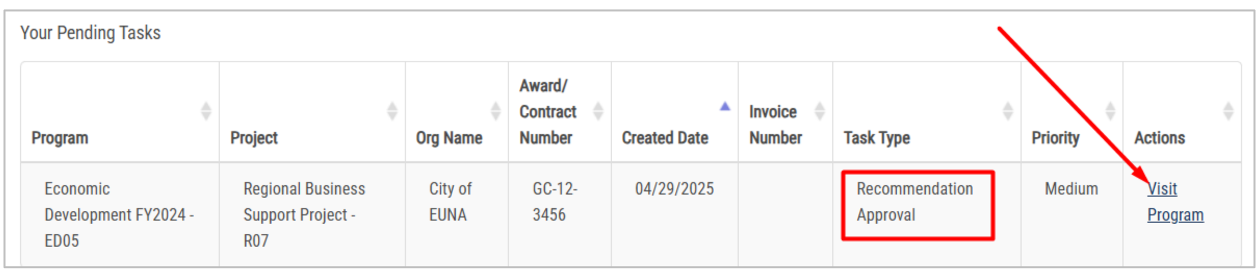
After an award recommendation approval request is submitted within Grants Network, it proceeds to the *Award Recommendation* workflow. The approvers in that workflow must complete the following while the initiator awaits their response:

1. If you are the current approver for the Award Recommendation Approval task, you will receive an email notification and open Grants Network to access the task on your Program Dashboard.

2. From the Grant Management tab, select Subrecipient Management:



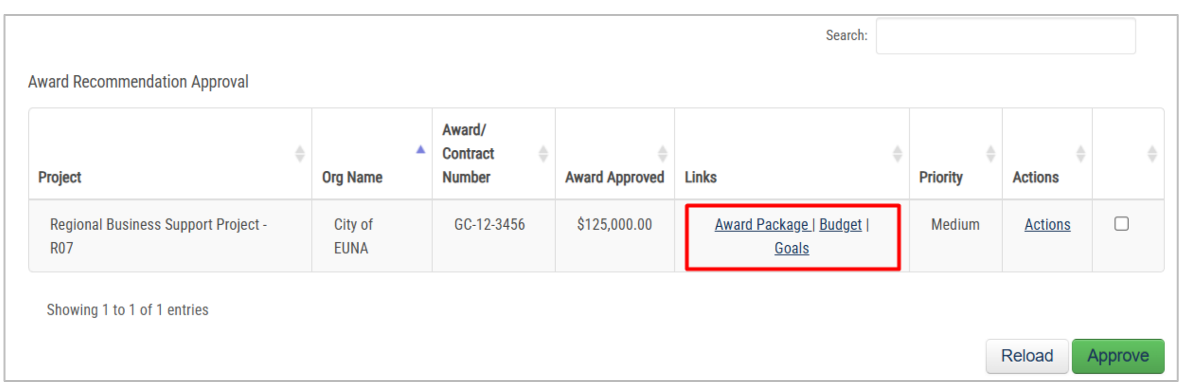

2. Under Your Pending Tasks, find the task and click on **Visit Program**. You can also use the search bar to search for the name of the program or filter the columns to find the task:



Your Pending Tasks

| Program | Project | Org Name | Award/ Contract Number | Created Date | Invoice Number | Task Type | Priority | Actions |
|---|---|---|---|---|---|---|---|---|
| Economic Development FY2024 - ED05 | Regional Business Support Project - R07 | City of EUNA | GC-12-3456 | 04/29/2025 | | Recommendation Approval | Medium | Visit Program |

3. You will be taken to the Program Detail page where the task will appear in the Award Recommendation Approval section. Use the links to view the details of the recommendation:



Search:

Award Recommendation Approval

| Project | Org Name | Award/ Contract Number | Award Approved | Links | Priority | Actions | |
|---|---|---|---|---|---|---|---|
| Regional Business Support Project - R07 | City of EUNA | GC-12-3456 | $125,000.00 | Award Package \| Budget \| Goals | Medium | Actions | ☐ |

Showing 1 to 1 of 1 entries

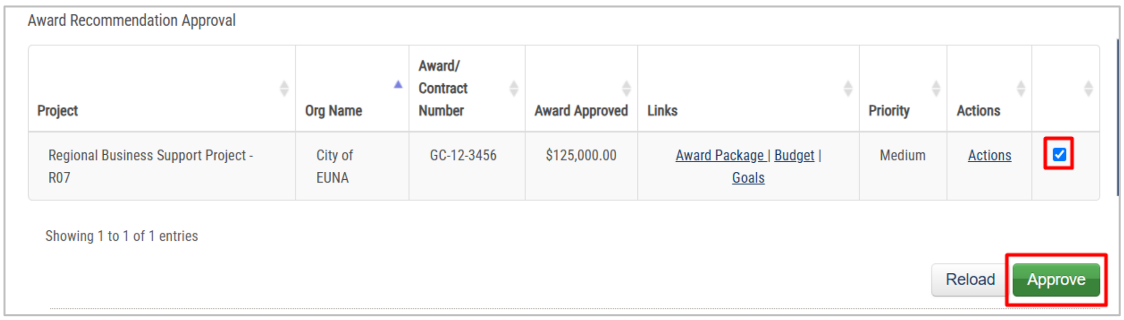
Reload Approve

a. Award Package: Opens a pop-up with the details entered in the Create Recommendation step.

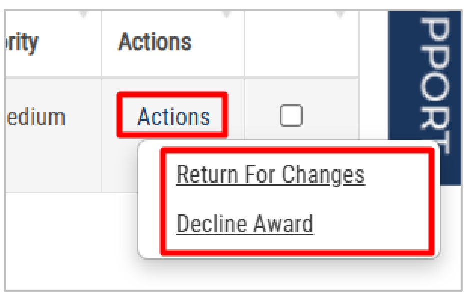
b. Budget: Opens the Budget worksheet in a separate tab.

c. Goals: Opens the Goals worksheet in a separate tab.

5. To approve, check the box to the right of any Recommendation and click the **Approve** button below the table.




6. Click **Actions** to enact one of the alternate responses shown below:




a. Return for Changes: Returns the award recommendation for program team members to edit the recommendation and re-submit for approval.

b. Decline Award: Marks the award recommendation as rejected and archives it within the Pending Awards table.

7. If the approver(s) have approved the Award Recommendation, the applicant will be notified by email that their award has been submitted for their review and acceptance. The Pending Awards section of the Program Detail Page will then display the **Pending Acceptance** status.

## Subrecipient Acceptance

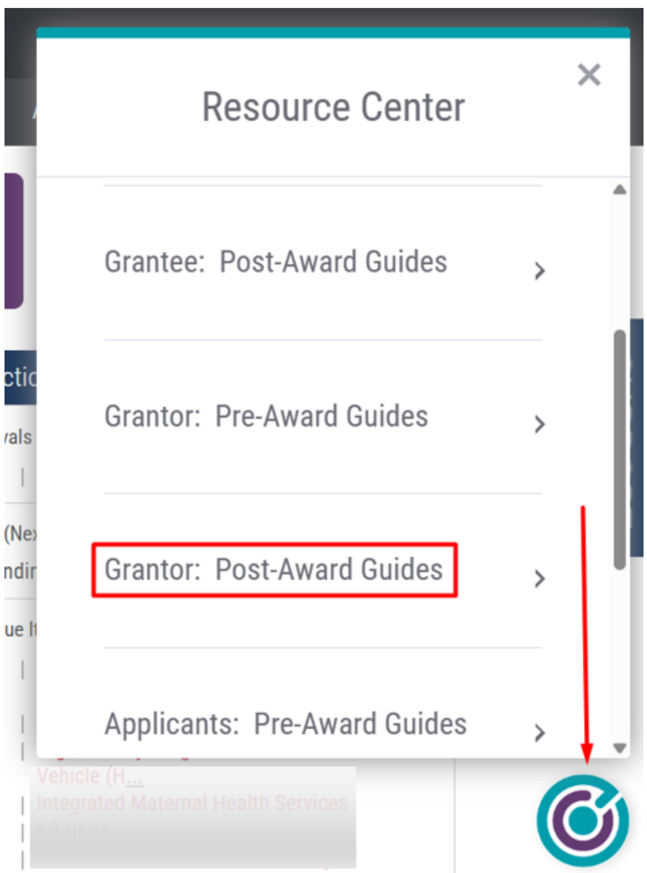
The awarded applicant will receive an email informing them of their Award Package. They will log into Portal to accept or return the package for changes. For more information on this process, see the Accepting an Award guide. (Location: Resource Center > Subrecipient: Post-Award Guides > Accepting an Award)

## Final Award Approval

Once your subrecipient has accepted the award package, this will trigger the Final Award Approval. Approvers in this process can review the Approving an Award Response guide for instructions on finding and responding to the task. (Location: Resource Center > Grantor: Post-Award Guides > Approving an Award Response)

## Post-Award

All other "Grantor: Post-Award Guides" in the Resource Center will detail the processes for managing your subrecipient awards from start to closeout!



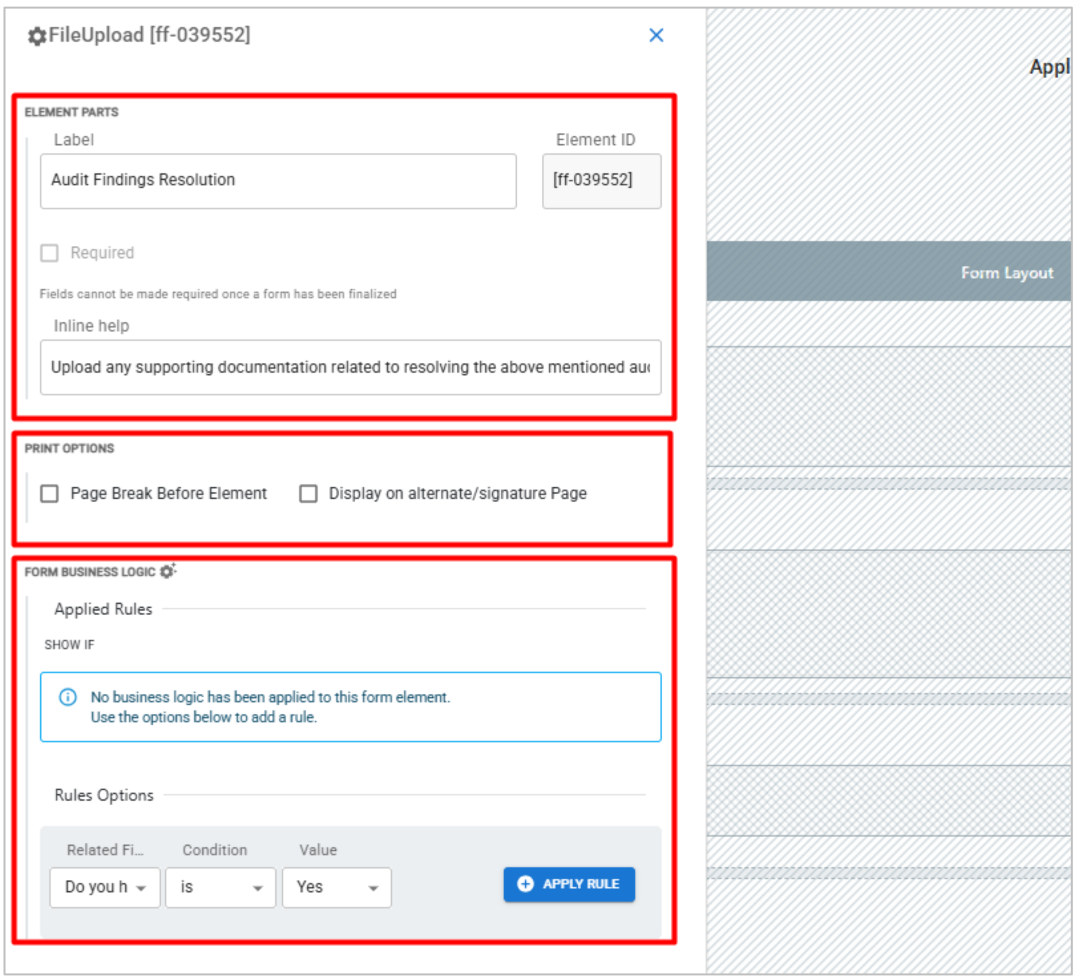
# Appendices

# Appendix A: Form Field Editing

Once a form field is added to an Application or Review Form, you can edit, duplicate, delete, or move this field using the options below:

1. To name and edit the options for this form field, click the pencil icon.


    a. A panel will open to the left of the page with options to edit three categories of field settings:

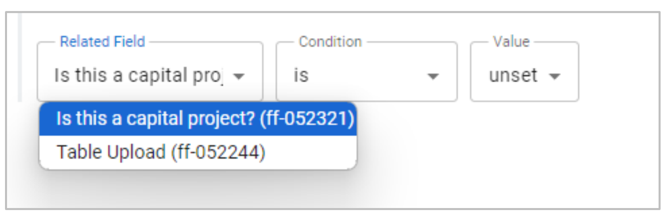


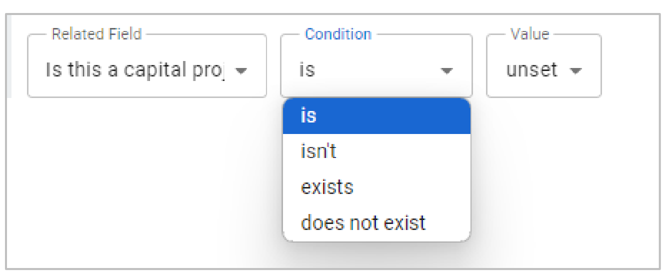
i. Element Parts
  1. **Label:** Enter the text that should display over this field
  2. **Element ID:** The unique identifier for this field. Use this, for example, when creating business logic where you will need other fields to show based on an applicant/reviewer's response to this field.
  3. **Required**: Makes this field required for form users to successfully submit
  4. **Inline help**: Appears to form users as small grey help text beneath the field
  5. Other settings specific to controlling this field

ii. Print Options
  1. **Page Break Before Element**: Insert a page break before this field
  2. **Display on alternate/signature page**: Places this field on a separate page, often coupled with a signature field element

iii. Form Business Logic
  1. To create business logic and set rules for when a field appears, select a field, condition and value

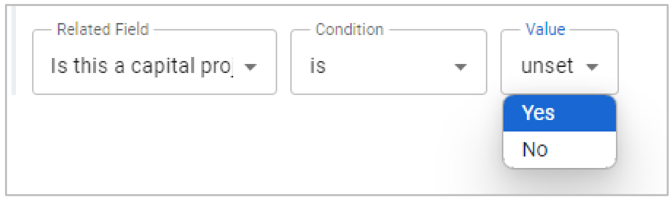
*__Note:__ The list of fields from your form will include the unique identifier to help differentiate between fields that have the same label



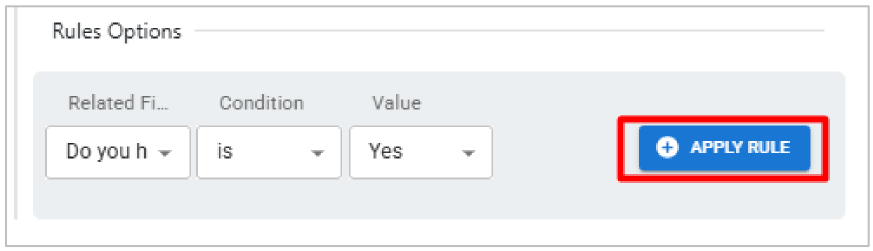





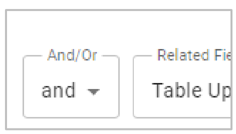

EUNA Grants




When finished, click **Apply Rule** to add this line of logic




2. If additional rules are needed, you must also select the **and/or** logic between multiple rules



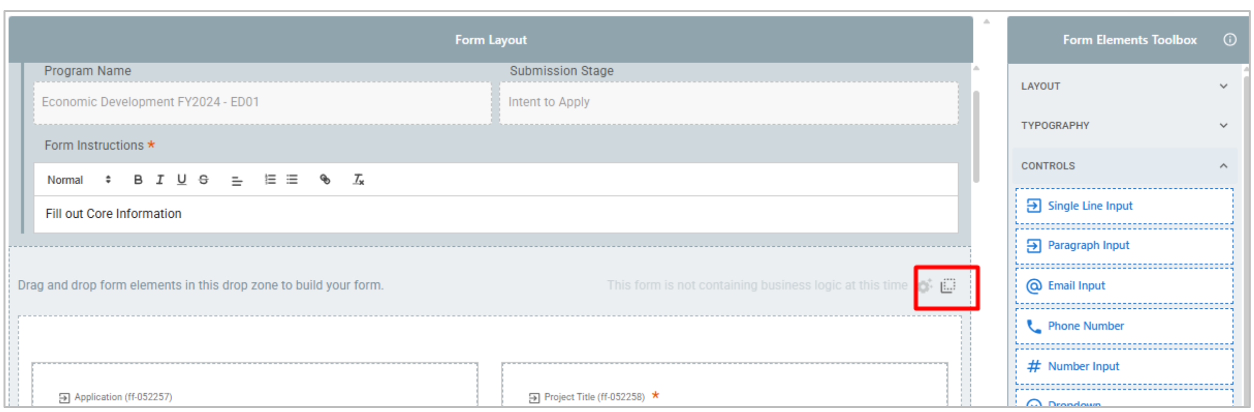

b. Review Forms come with a calculated **Total Score** that displays to Reviewers at the bottom of the form. This will also appear in your table of submitted review responses.

   i. When editing a Number field (or a Dropdown or Radio Button element that has a numerical value as a response) that will be included in the Total Score, check the box labeled **Include in Total Score.**

   ii. Include a minimum and maximum value for this field

iii. When reviewers fill the form, they will see the Total Score displayed as a fraction of the total possible points. The total possible points will be a sum of the maximum values of all included numerical fields. You may test this in Preview mode while editing.


2. To duplicate this form field, click the copy icon, and then click the grey paste icon (at the top of the form), to add the copied field.

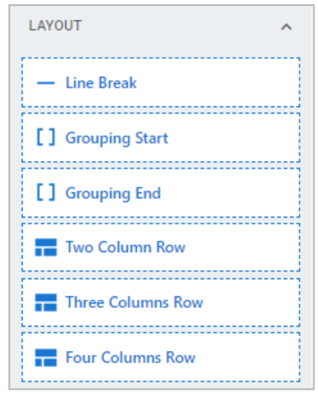
3. To delete this field, click the trash can icon


4. To move this field, click the grid icon and drag the field to another location

# Appendix B: Form Elements Toolbox

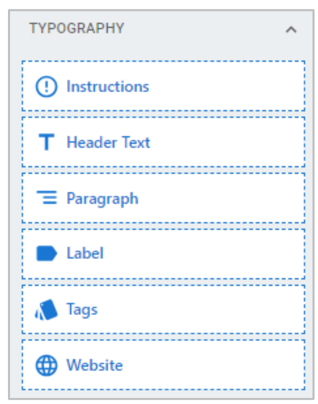
There are four categories of Form Elements for Application and Review Forms. See the descriptions below for how to use each element.

1. Layout: Use these to create groupings of field rows or columns within a row.




   a. **Line Break:** Creates a line break between sections of the form
   b. **Grouping Start:** Creates a grouping box around any fields below this element but above the next "Grouping End"
   c. **Grouping End:** Creates a grouping box around any fields above this element but below the next "Grouping End"
   d. **Two Column Row:** Creates a split row for two form elements to display side-by-side within a single row
   e. **Three Columns Row:** Creates a split row for three form elements to display side-by-side within a single row
   f. **Four Columns Row:** Creates a split row for four form elements to display side-by-side within a single row

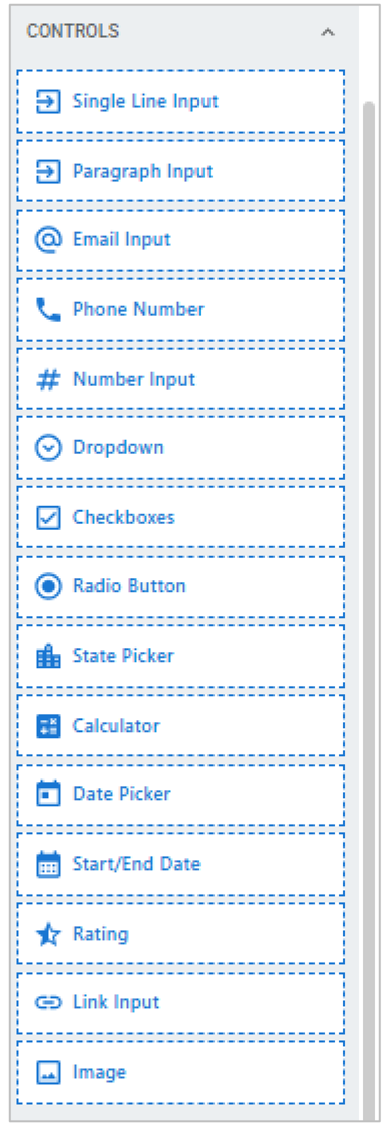
2. Typography: Use these to display important information to Applicants within the form.




   a. **Instructions:** Provides a box of instructional text to be displayed
   b. **Header Text:** Provides a text heading to place above sections of the form
   c. **Paragraph:** Provides a piece of long-form text to be displayed above specific fields or sections of the form
   d. **Label:** Provides a piece of long-form text to be displayed above specific fields or sections of the form
   e. **Tags:** Provides a prompt and a list of available tags
      from which the user can select as many as are applicable
   f. **Website:** Provides a URL with the option to label the link as needed

3. Controls: Use these to create the content for Applicants to fill.
    a. **Single Line Input:** Allows for input of a short amount of text, typically one line
    b. **Paragraph Input:** Allows for input of a large amount of text, typically paragraphs of information
    c. **Email Input:** Formatted for email address input
    d. **Phone Number:** Formatted for phone number input
    e. **Number Input:** Allows for numerical values, including formatting for currency
    f. **Dropdown:** Allows a user to select from a pre-determined list of options presented as a dropdown. Users can select only one option.
    g. **Checkboxes:** Allows for a user to select one or more options from a pre-determined list of options presented as checkboxes
    h. **Radio Button:** Allows for a user to select from a pre-determined list of options presented as radio buttons. Users can select only one option.
    i. **State Picker:** Pick from a pre-populated list of States
    j. **Calculator:** Configure to display a value that calculates from other numerical fields in the form

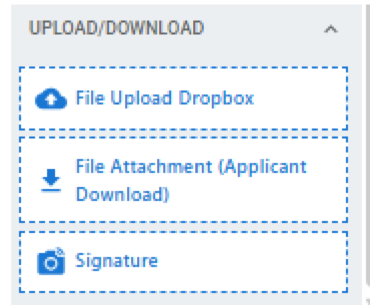
       *__Note:__ Review Forms also come with a calculated "Total Score" display at the bottom of the form, allowing users to simply flag any numerical fields to add into that total score while they are building out the review form. [See Appendix A for more information].




    k. **Date Picker:** Allows for a user to pick a date from a calendar view
    l. **Start/End Date:** Allows for a user to pick a start and end date while viewing a calculation of total time and remaining time
    m. **Rating:** Allows for a user to provide a rating against a provided prompt using a five-star scale
    n. **Link Input:** Allows for a user to provide an external link and a link label
    o. **Image:** Places an image within the form to be viewed by the submitter

4. Upload/Download: Use these to collect files and drawn signatures from applicants or to post a file for applicants to download.

    a. **File Upload Dropbox:** Allows for a user to upload a file
    b. **File Attachment (Applicant Download):** Places a downloadable file within the form to be downloaded by the submitter
    c. **Signature:** Creates a boxed area for the applicant to draw a signature on the application



# Appendix C: Templates

Grantor Teams can better standardize programs, save time, and reduce human error by creating Templates. You can create and save Templates for the following:

a. Application Processes
b. Submission Stages
c. Evaluation Stages
d. Application Forms
e. Review Forms

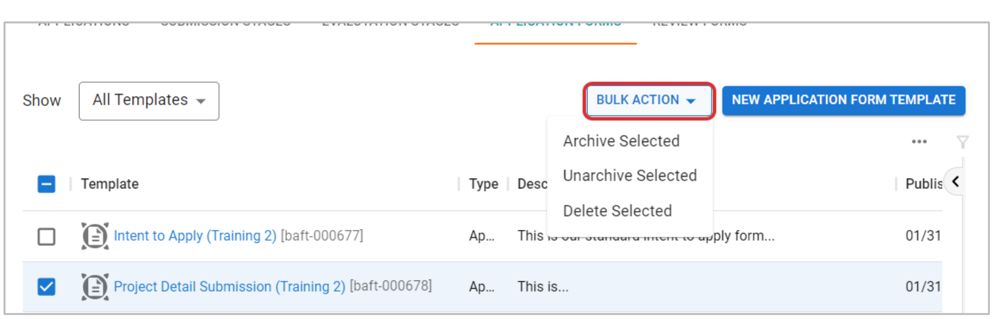
Once created, you can copy that Template information into the Application Process for any new programs you build. Then, you may continue editing and adding information to suit the specific needs of the program.

To access the Templates page, expand the left-hand navigation bar and select the **Templates** option.

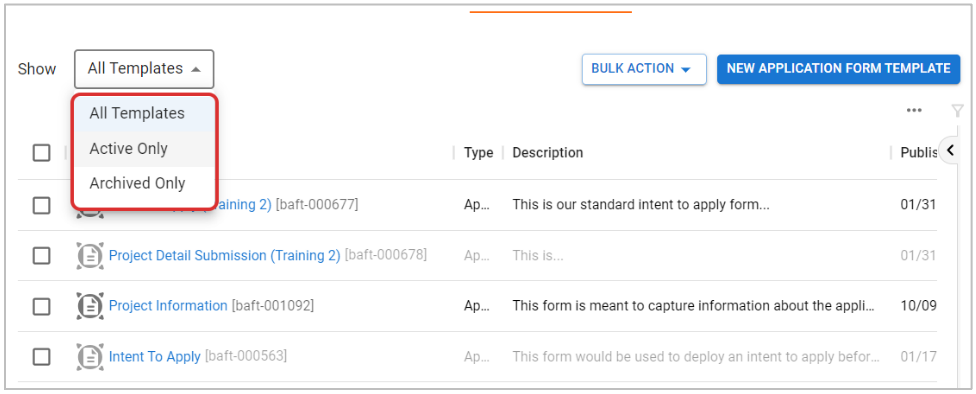

## Template Management

Below are the general instructions for managing any of the five Template types:

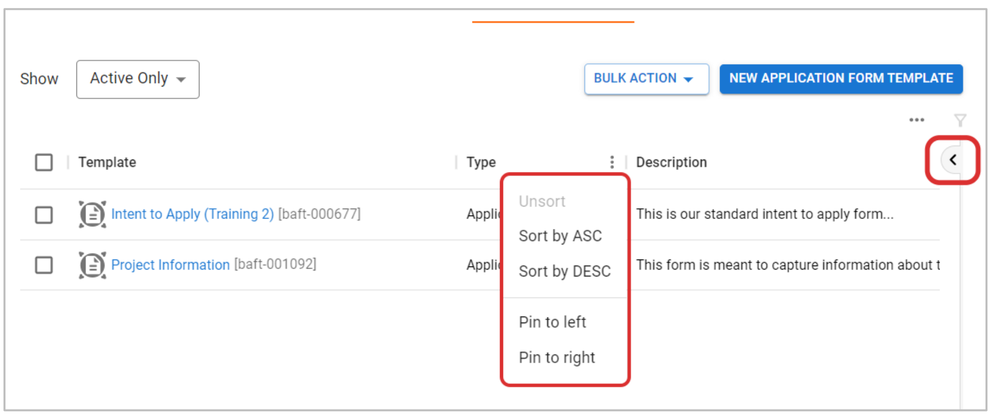
1. To archive, unarchive, or delete Templates, select the desired Templates from the table and open the Bulk Action menu button to select the desired action.



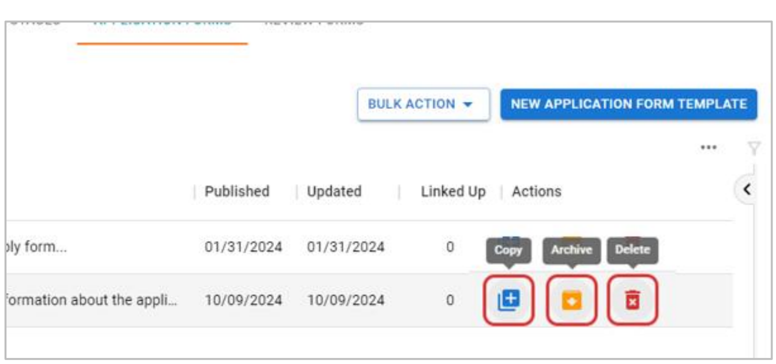
2. Click the **Show** dropdown to select which Templates will show in the table. Select **Active Only** or **Archived Only** to narrow the results.



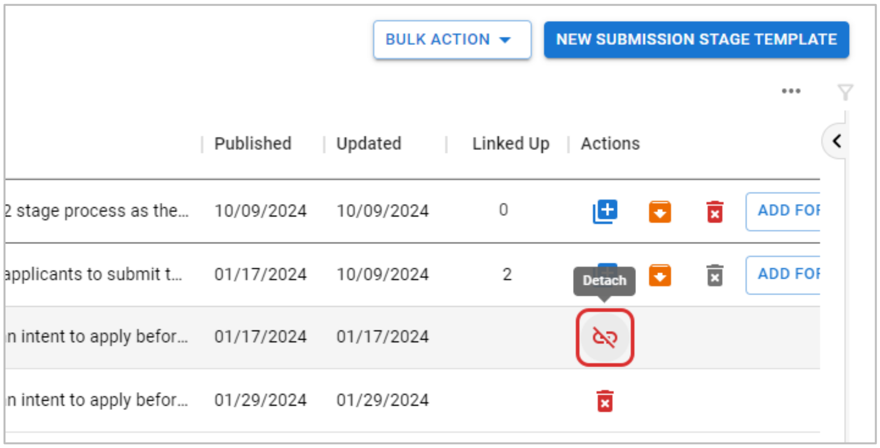

3. For further sorting and filtering, click the three vertical dots above any column or expand the right-hand filter bar by clicking the arrow on the top-right corner of the table.




4. To copy, archive, or delete a Template, select from the buttons underneath the Actions column (the right-most column)



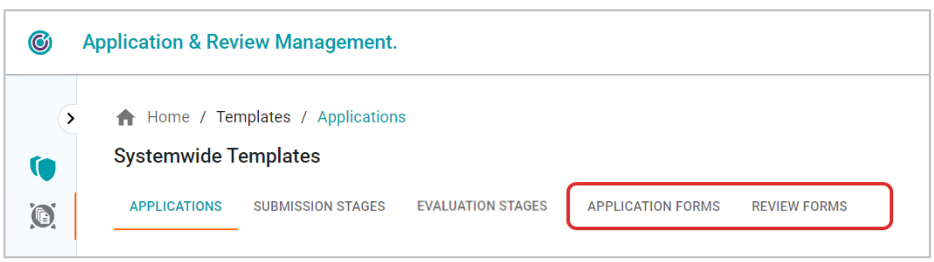
5. You can remove a linked Template Form from a Template Stage by clicking the **Detach** button from the Actions column.



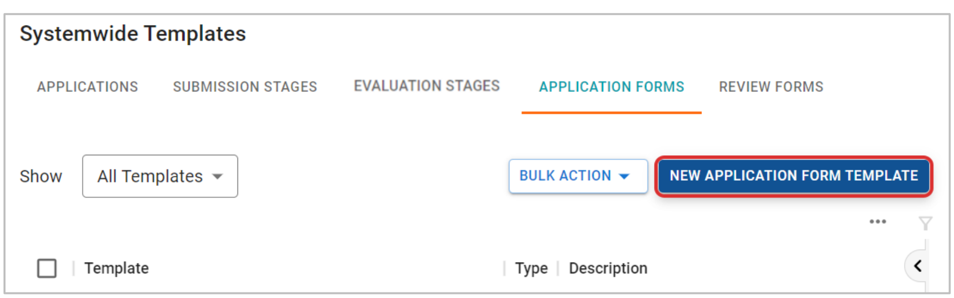

## Form Templates

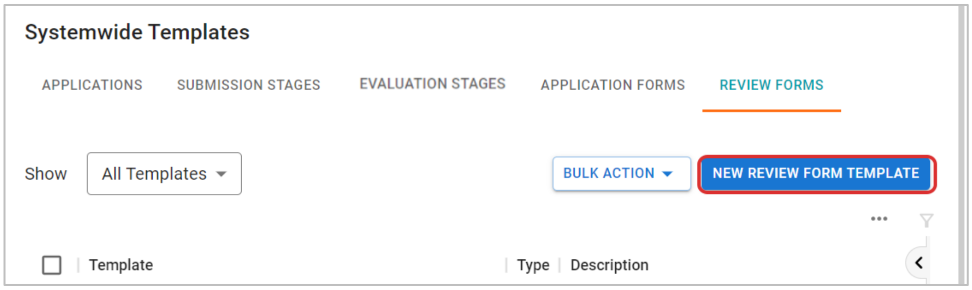
To manage Form Templates that can be copied into your programs, you will see two headings titled **Application Forms** and **Review Forms**. Below are the steps to start creating and managing Form Templates:

***Note:** To standardize further and save time building Programs, Application Form Templates can be linked into Submission Stage Templates and Review Form Templates can be linked into Evaluation Stage Templates.

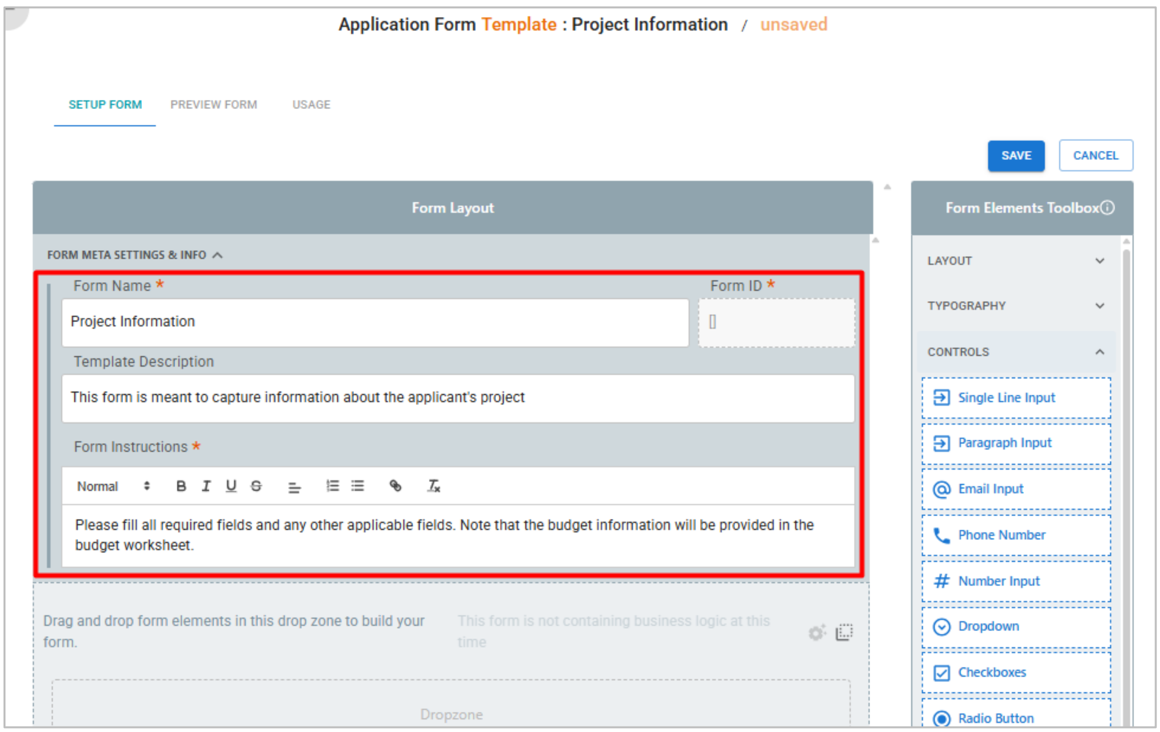



1. After selecting the Application Forms or Review Forms header, you can create a new form Template by clicking the blue button titled **New Application Form Template** or **New Review Form Template**.

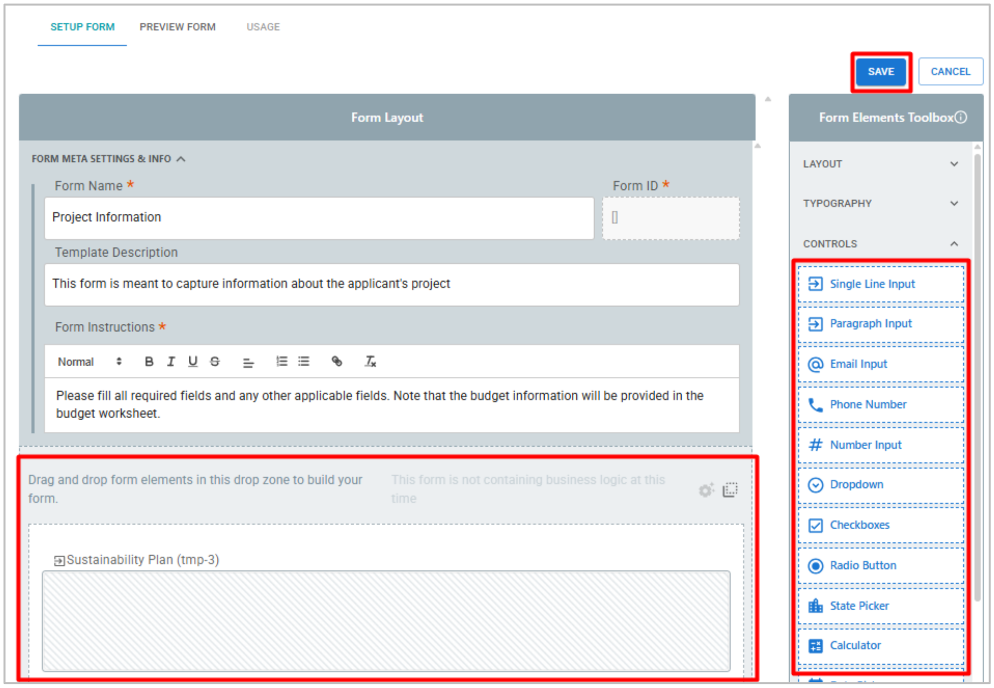





2. Then, fill the Form Name and Form Instructions that should appear to the Applicant/Reviewer. Along with that, you will write a Template Description that gives the internal need for this form. The Template Description will NOT appear to the Applicant/Reviewer.

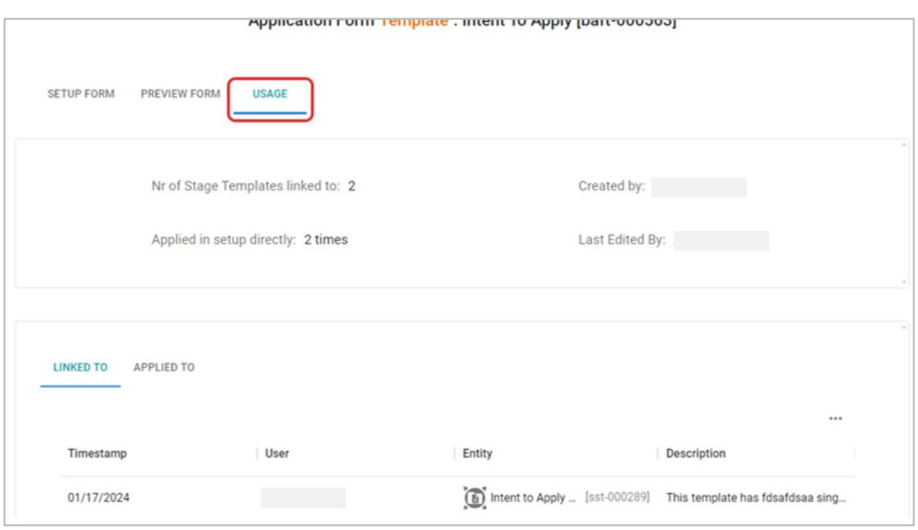


3. Lastly, build the Form Elements needed [See Appendix A and B]. Use the Preview Form section [at the top] to preview your work. Click **Save** when finished.




4. To view where and how this Template is being used across your Programs, click the **Usage** heading at the top. On top of displaying which user created it or made the last edits, the page shows where this template is “linked” and “applied”:

    a. Linked: Form Templates can be linked to a Stage Template. This allows both a Stage Template and its Forms to be copied into a program all at once.
    b. Applied: Users “apply” a Form Template to an individual Program when building out its stages and forms

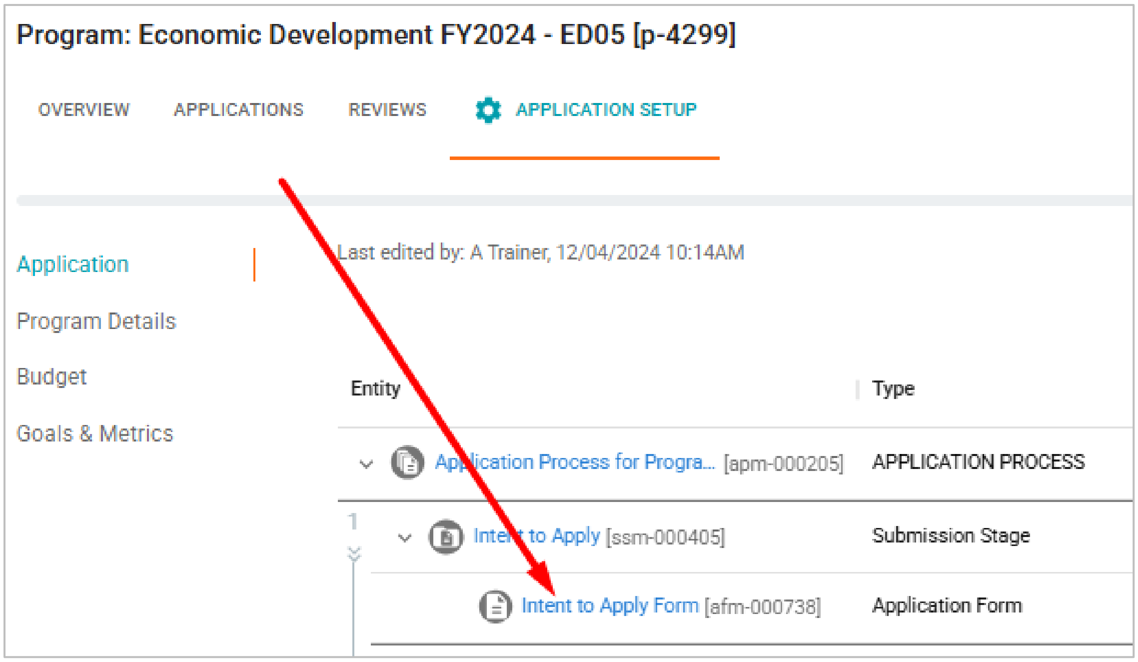


## Copying Existing Forms to Form Templates

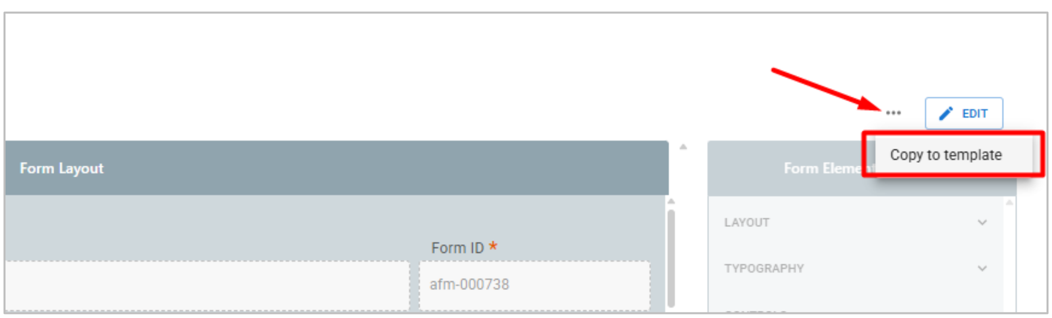
To copy content from existing Application and Review Forms, use the **Copy to Template** option to create an Application Form Template or Review Form Template.

The newly created form templates can then be copied directly into any program. They can also be linked as part of a Submission Stage Template or Evaluation Stage Template.

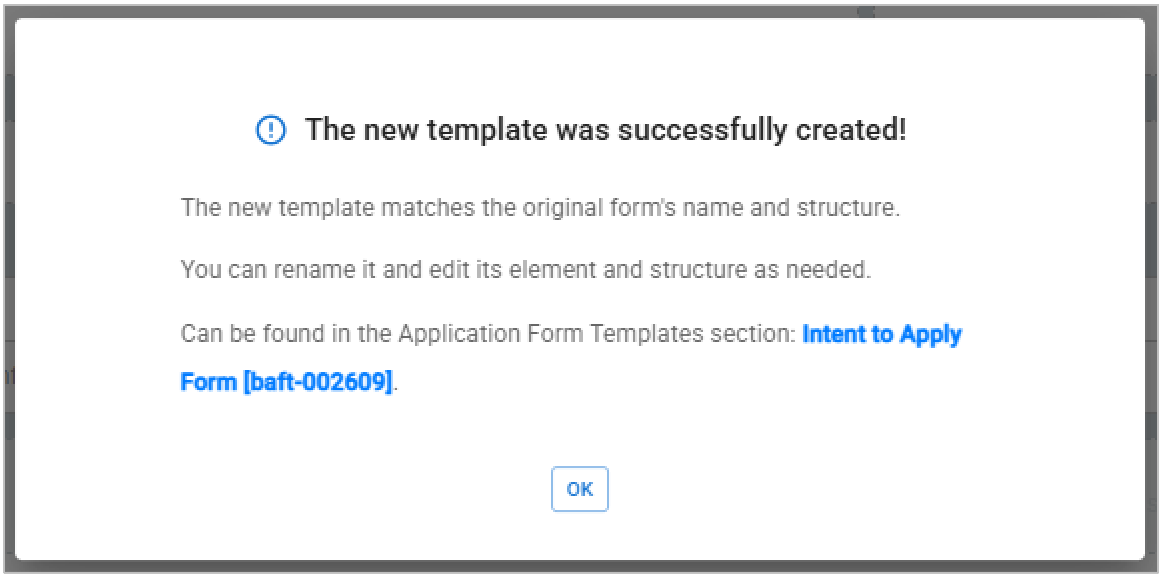
1. Find the program containing the form you wish to copy. Click the form name



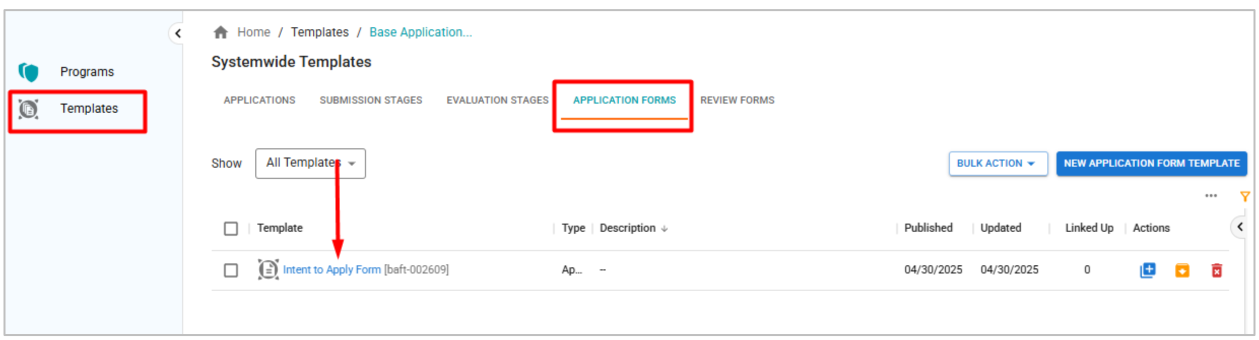

2. Click the three-dot menu icon beside the Edit button. Select **Copy to Template**



3. A message will display, confirming that the new template was successfully created and can be found in the Templates section.




4. Open the Templates section from the left-hand navigation bar and select the Application Forms or Review Forms section to find the newly created template.
5.

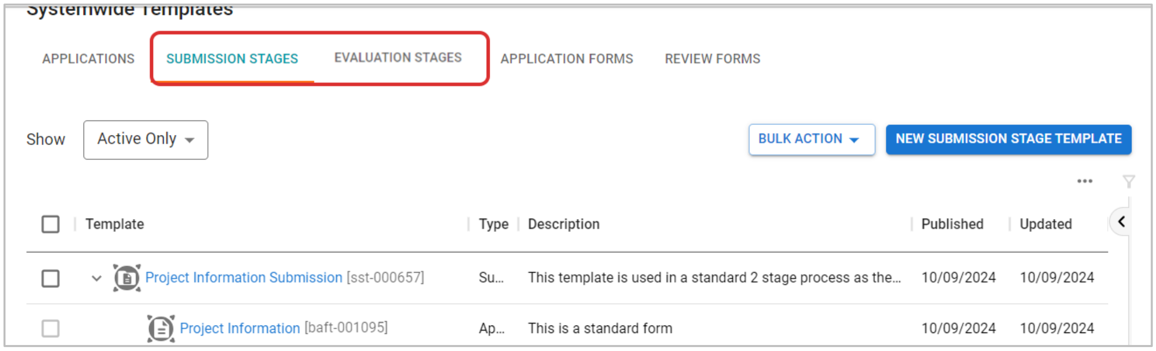



6. Open the template to edit as needed. Or begin using right away in your programs or stage templates.

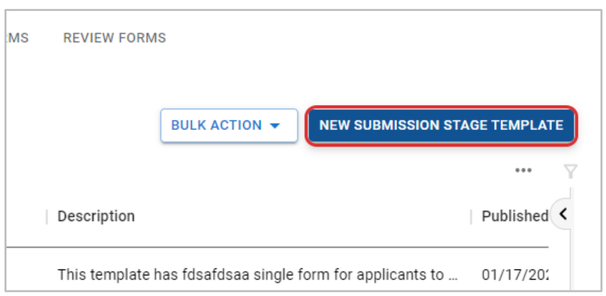
## Stage Templates

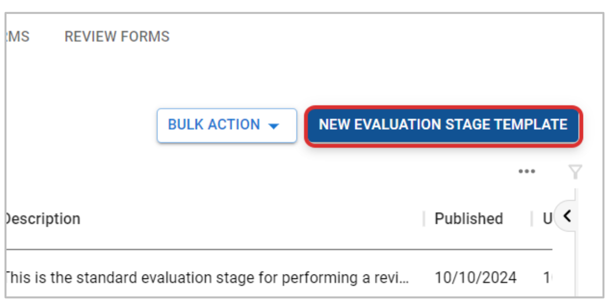
To manage Stage Templates that can be copied into your programs, you will see two headings titled **Submission Stages** and **Evaluation Stages**. Below are the steps to start creating and managing Stage Templates:

***Note:** To standardize further and save time building Programs, Submission Stage Templates and Evaluation Stage Templates can both be linked into Application Process Templates.

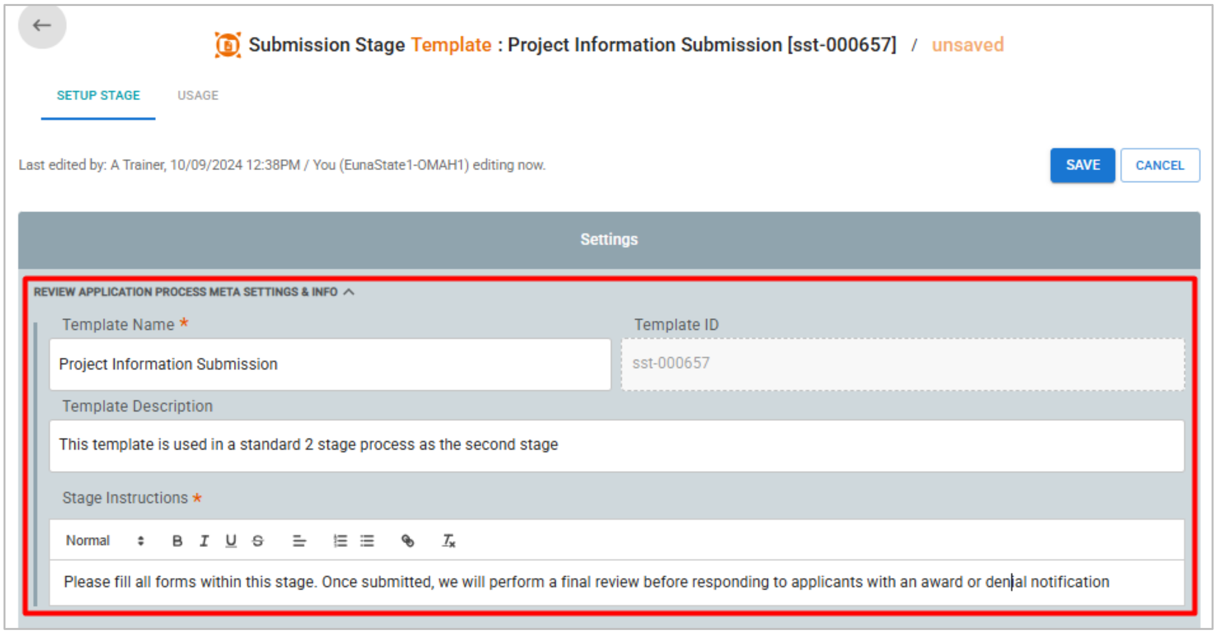



1. After selecting the Submission Stages or Evaluation Stages header, you can create a new Stage Template by clicking the blue button titled **New Submission Stage Template** or **New Evaluation Stage Template**.



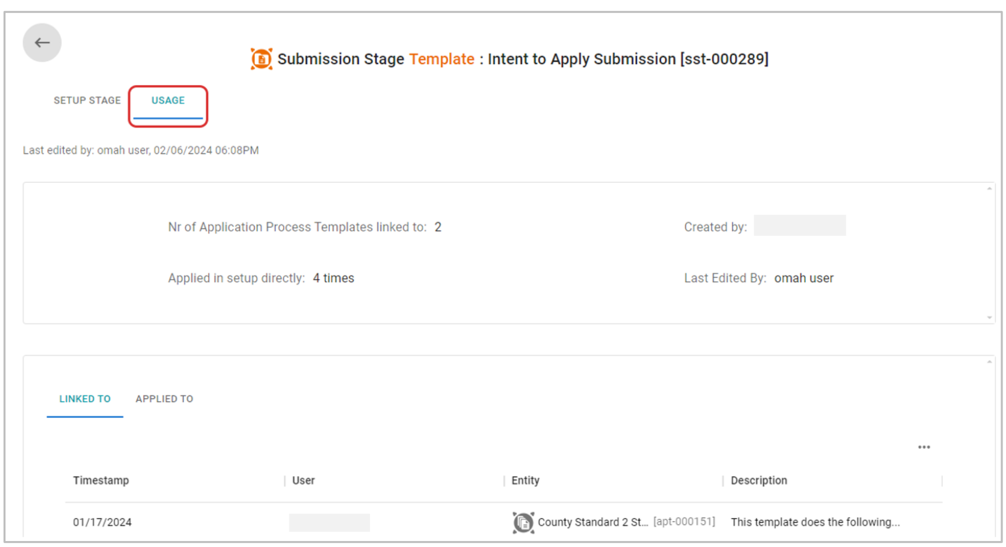

2. Then, fill the Template Name and Stage Instructions that should appear to the Applicant/Reviewer. Along with that, you will write a Template Description that gives the internal need for this form. This will NOT appear to the Applicant/Reviewer.




3. Click **Save** when finished.

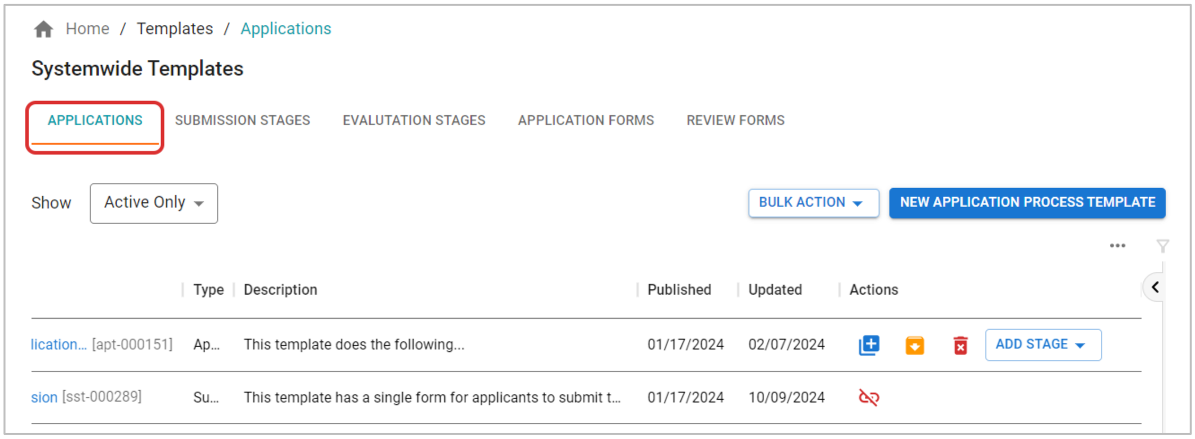
4. To view where and how this Template is being used across your Programs, click the **Usage** heading at the top. On top of displaying which user created it or made the last edits, the page shows where this template is “linked” and “applied”:

    a. Linked: Stage Templates can be linked to an Application Process Template. This allows both an Application Process with its Stages to be copied into a program all at once.
    b. Applied: Users “apply” a Stage Template to an individual Program when building out its stages and forms.

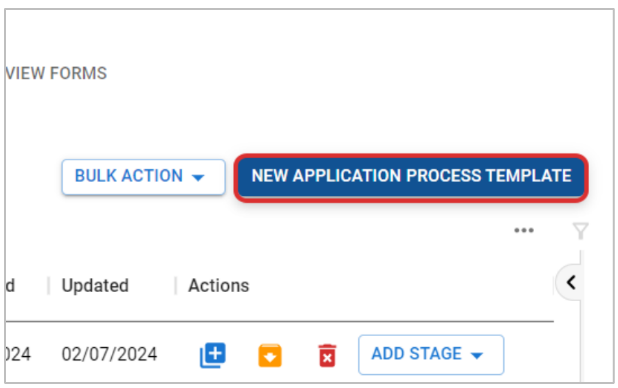


## Application Process Templates

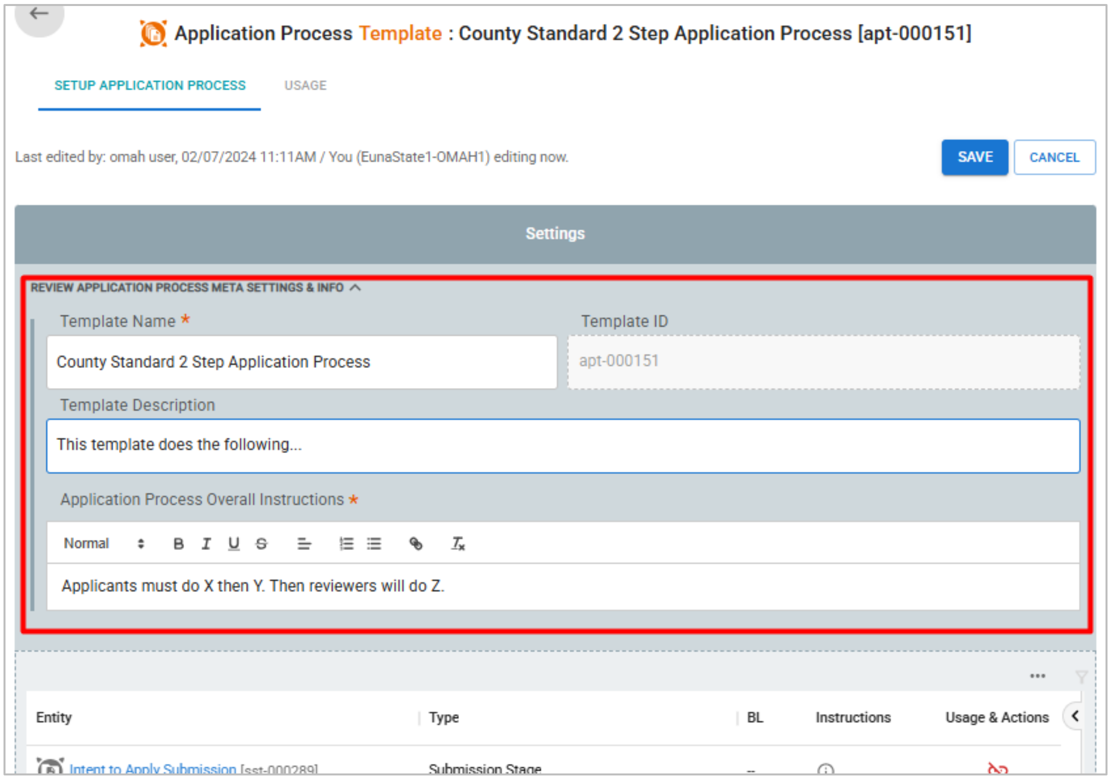
To manage Application Process Templates that can be copied into your programs, you will see a heading titled **Applications**. Below are the steps to start creating and managing Application Process Templates:




1. After selecting the Applications header, you can create a new Application Process Template by clicking the blue button titled **New Application Process Template**.

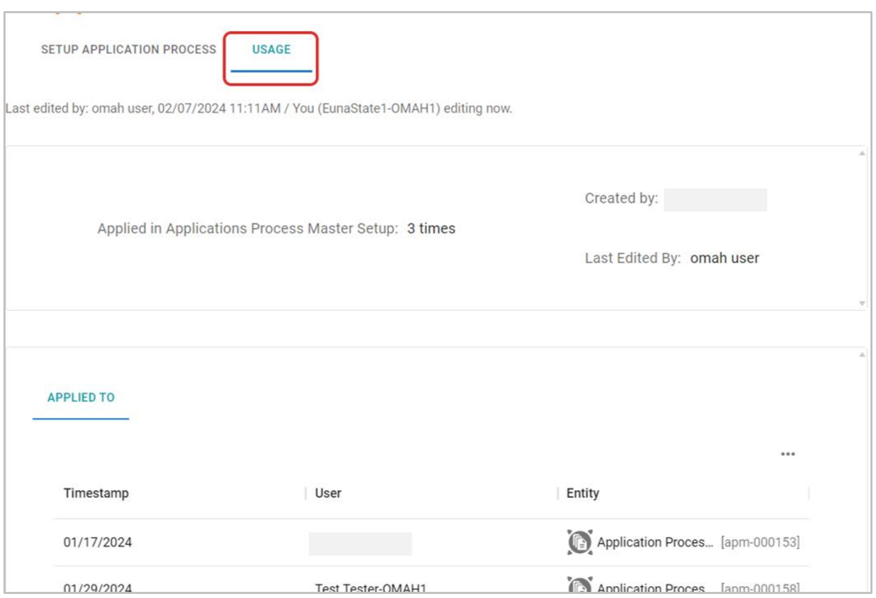



2. Then, fill the Template Name and Application Process Overall Instructions that should appear to the Applicant. Along with that, you will write a Template Description that gives the internal need for this form. This will NOT appear to the Applicant.




3. Click **Save** when finished.

4. To view where and how this Template is being used across your Programs, click the **Usage** heading at the top. On top of displaying which user created it or made the last edits, the page shows where this template is "applied". Users can "apply" an Application Process Template to an individual Program to apply stage and form templates all at once.



# Appendix D: Budget Worksheets

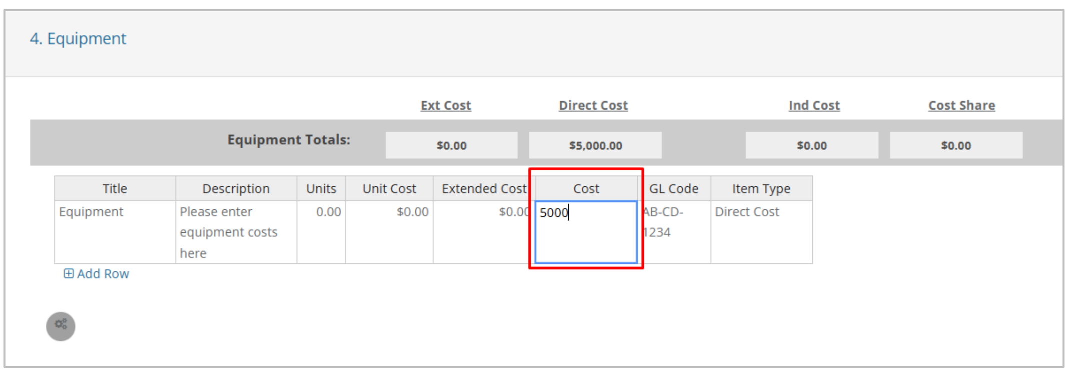
Grant Programs with Budget Development include a Budget Worksheet Template with predefined categories and initial line items. Applicants can add additional cost lines as needed. This ensures standardized financial tracking of awards according to specific cost categories. Applicants are required to:

1. Include a categorized budget proposal in their application, which will automatically calculate the total award amount requested.
2. If awarded, manage their award budget and spending reports according to the same budget categories.

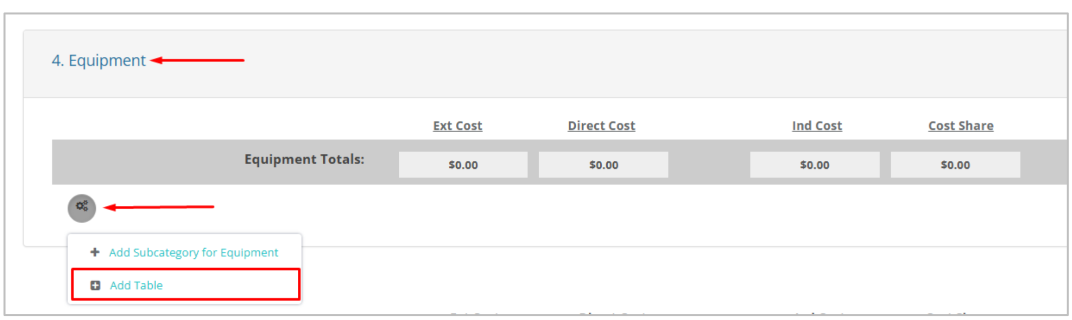
The below is an overview of how applicants can complete the Budget Worksheet when applying:

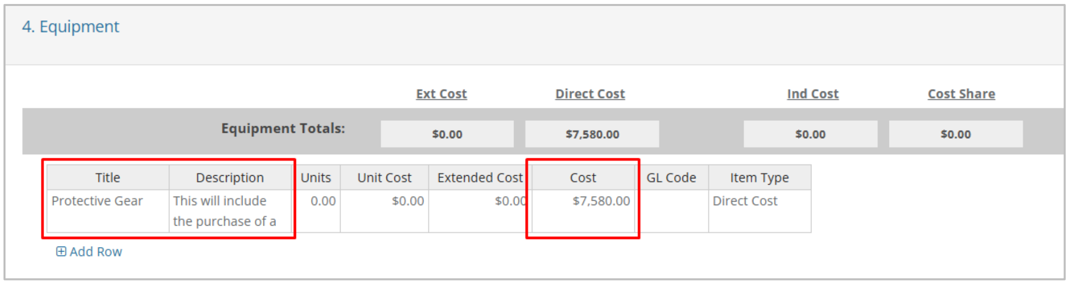
1. In the worksheet, click on any applicable budget category (hyperlinked in blue) to enter costs.

   For budget worksheets with pre-configured tables and line items, simply enter projected costs into the cost column.



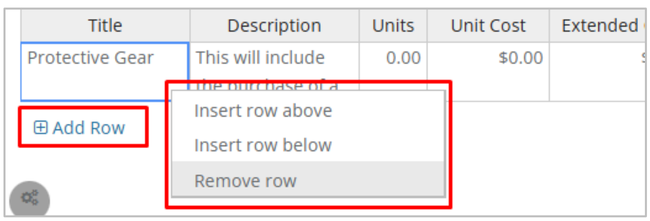

   Alternatively, for budget worksheets with no prescribed line items, click the gear icon and **Add Table** to enter the title, description, and cost for each line item.



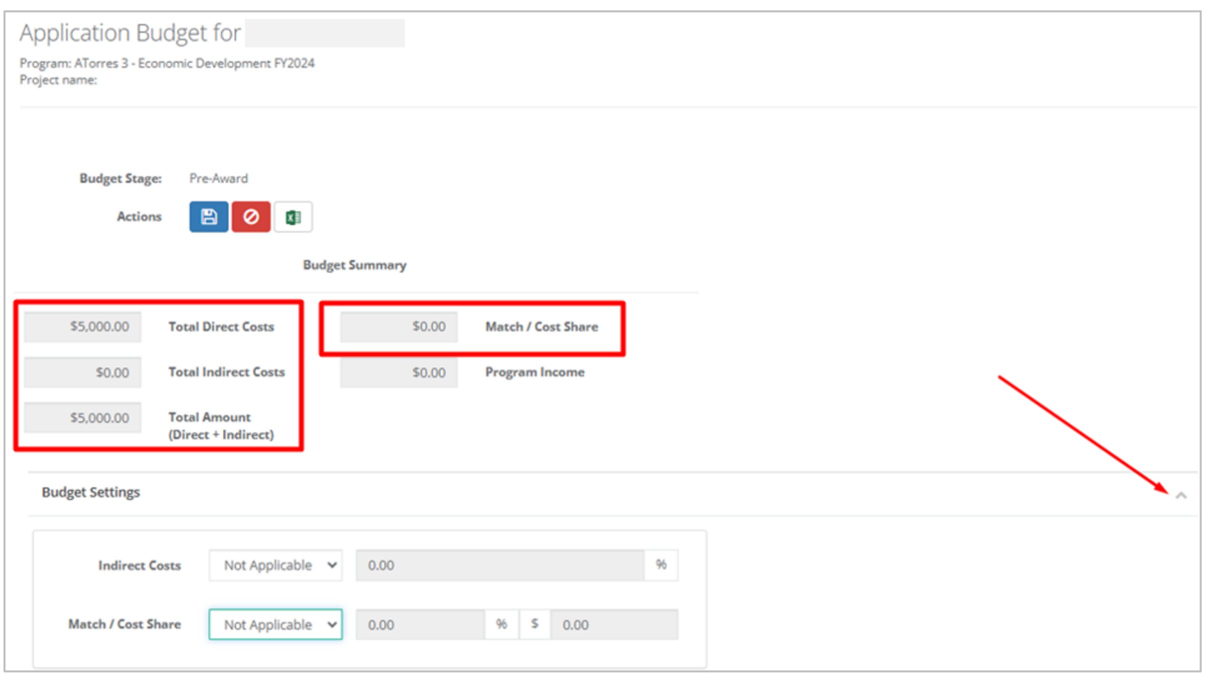



*Note: When needed, use the Units and Unit Cost fields to multiply those values into the **Extended Cost** field, which will copy into the **Cost** field. Remember to clear all four of these fields if you need to re-enter the calculation.

2. To add a row, click the **+Add Row** button below that table. To remove or insert rows above/below, right-click anywhere on the desired row and select an option.



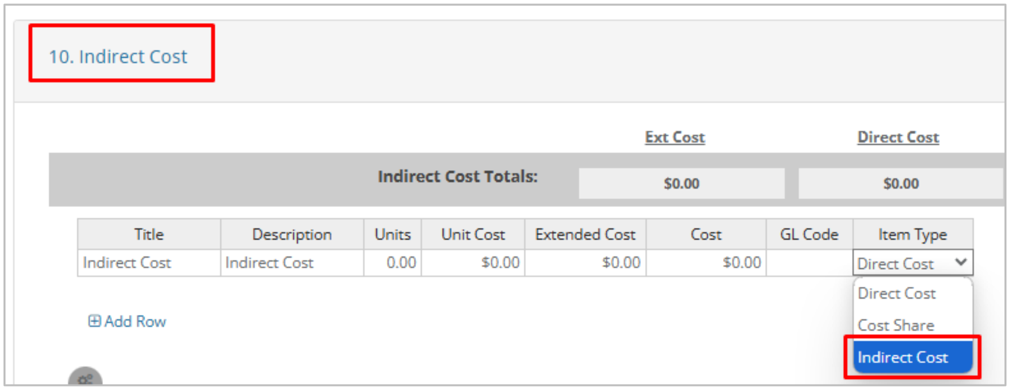

3. Budget Settings: Locate the Budget Settings at the top of the page to select a different method of calculating Indirect Costs and Match/Cost Share. You will see these cost types separated in the Budget Summary section at the top of the worksheet.



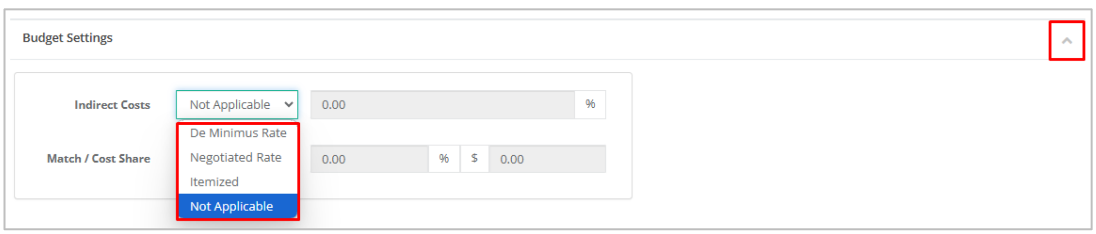



EUNA Grants

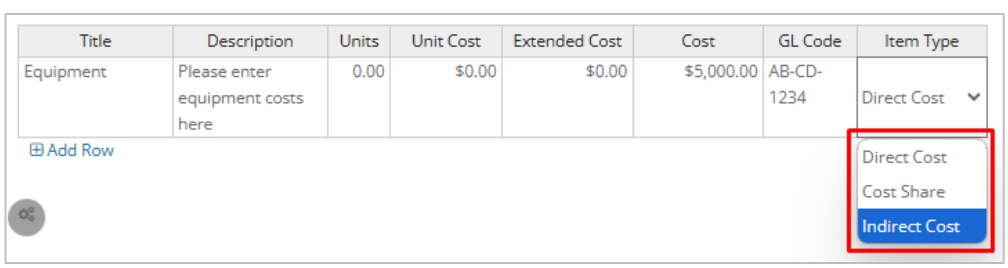
*Note: Since Financial Reports require Subrecipients to combine direct and indirect spending into a single amount per category titled "spend", some budget worksheets may include a separate category titled "Indirect Costs" to facilitate tracking these expenses separately.




a. Indirect Cost — Specific and limited costs allotted within an award that indirectly relate to the awarded project or services. Methods for entering Indirect Cost include:




i. Not Applicable (Default Setting) — Use this to specify each indirect cost as a line item and toggle the **Item Type** for that line from **Direct Cost** to **Indirect Cost**.



ii. Itemized — Use this to add a match/cost share value to the Direct Cost within a specific line item. Thus, marking the line item as partially indirect.

| | Ext Cost | Direct Cost | Ind Cost | Cost Share |
|---|---|---|---|---|
| Personnel Totals: | $41,000.00 | $41,000.00 | $12,000.00 | $0.00 |

| Title | Description | Units | Unit Cost | Extended Cost | Cost | GL Code | Indirect Cost | Item Type |
|---|---|---|---|---|---|---|---|---|
| FTEs | Full-time employees | 1.00 | $35,000.00 | $35,000.00 | $35,000.00 | | $12,000.00 | Direct Cost |
| PTEs | Part-time employees | 2.00 | $3,000.00 | $6,000.00 | $6,000.00 | | $0.00 | Direct Cost |

⊞ Add Row

iii. De Minimus Rate — Applies the federal De Minimus indirect cost rate (15% per Uniform Guidance 2 CFR 200) to each budget line with the Indirect Cost checkbox selected. All selected lines are thus presumed to be direct, but with a 15% indirect allocation added on top. This setting is ideal when you prefer not to detail indirect costs as separate line items and instead award a default allocation for unspecified indirect expenses.

| ost | Cost | GL Code | Indirect Cost | Item Type |
|---|---|---|---|---|
| .00 | $78,000.00 | | ☑ | Direct Cost |

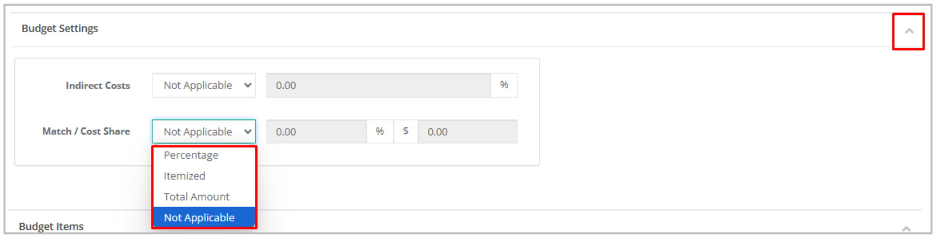
iv. Negotiated Rate — Functions the same as De Minimus, but with the ability to edit the rate (in accordance with an agreed upon indirect cost rate agreement [ICRA] negotiated with the cognizant funding agency).

| | | | |
|---|---|---|---|
| Indirect Costs | Negotiated Rate | 17.00 | % |

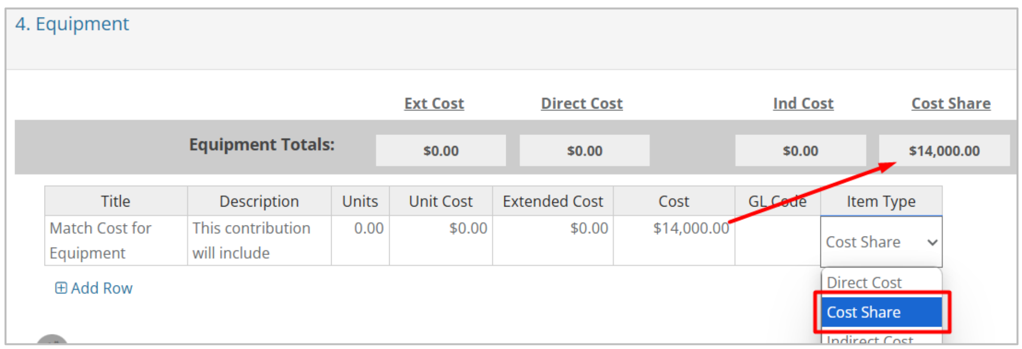
| Direct Cost | Ind Cost | Cost Share |
|---|---|---|
| $78,000.00 | $13,260.00 | $0.00 |

| Cost | GL Code | Indirect Cost | Item Type |
|---|---|---|---|
| $78,000.00 | | ☑ | Direct Cost |

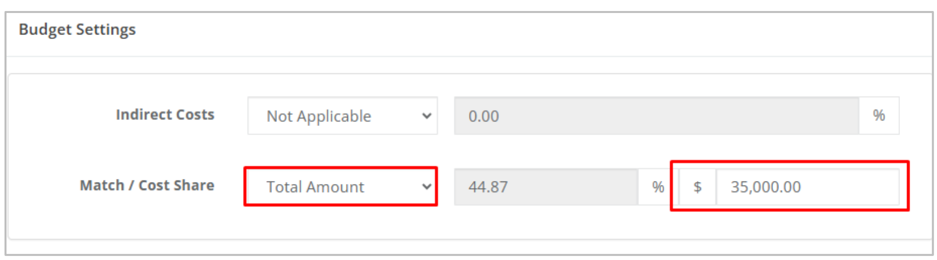
b. Match/Cost Share — Funds the subrecipient will contribute, or costs they will incur, from other resources to match against the award amount toward the grant project or services. Methods for entering Match/Cost Share include:



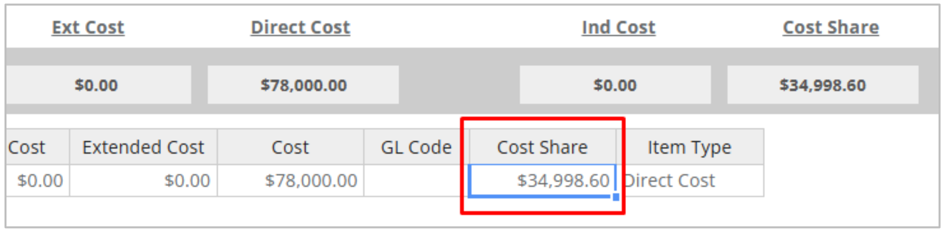

i. Not Applicable (Default Setting) — Use this to specify each match/cost share item as a line item. Then, toggle the **Item Type** for that line from **Direct Cost** to **Cost Share**.



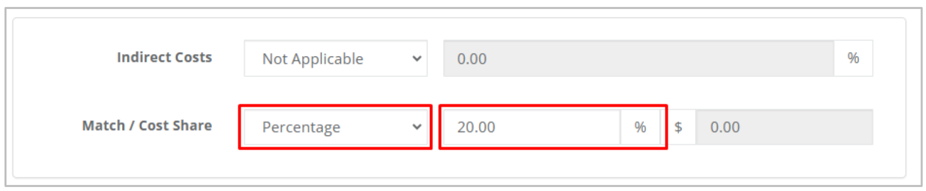

ii. Total Amount — Use this to enter a total match/cost share amount at the top of the Budget Worksheet

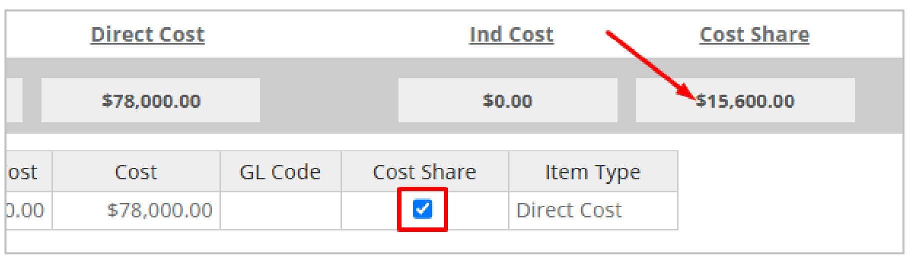


iii. Itemized — Use this to add a match/cost share value to the Direct Cost within a specific line item. Thus, marking the line item as partially cost share.

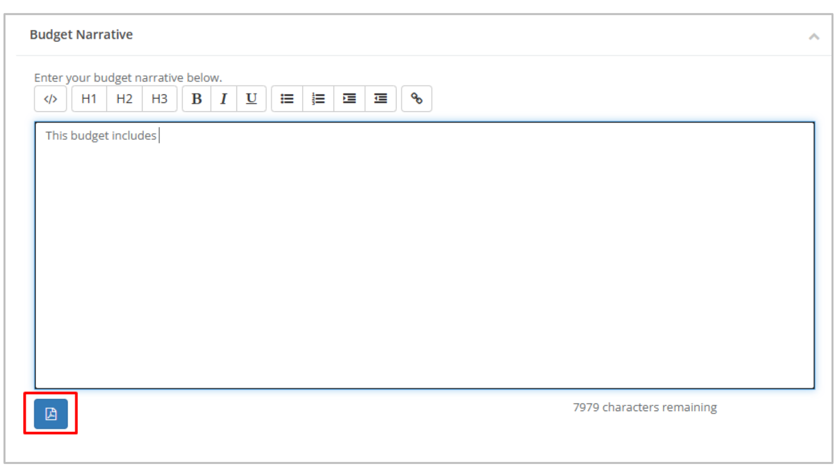



iv. Percentage — Enter a percentage value in the settings bar and select the Cost Share checkbox next to any budget line. This adds the specified percentage of cost share on top of the direct cost value of that line item.

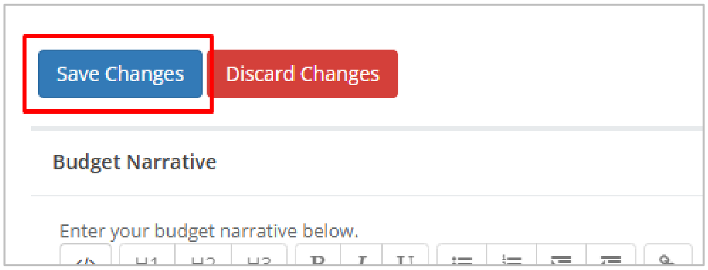


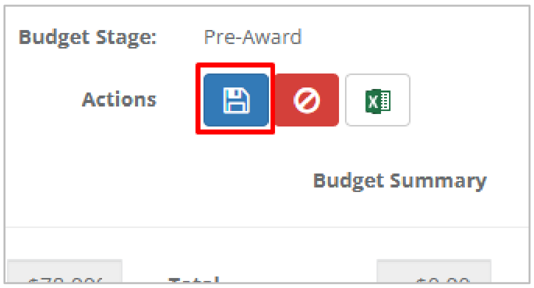




4. Budget Narrative (Optional): Unless directed to provide this information elsewhere, applicants may provide a detailed justification for the proposed budget here. This can also be exported to PDF for the applicant's internal records



5. When finished editing the budget worksheet, click the **Save Changes** button (bottom of the worksheet) or the floppy disk icon (top of the worksheet) and input any relevant notes




6. Any notes an applicant adds will be timestamped and logged in the **Revisions** history to the left of this popup. This history is visible to both applicants and Grantor users reviewing this budget.