



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.

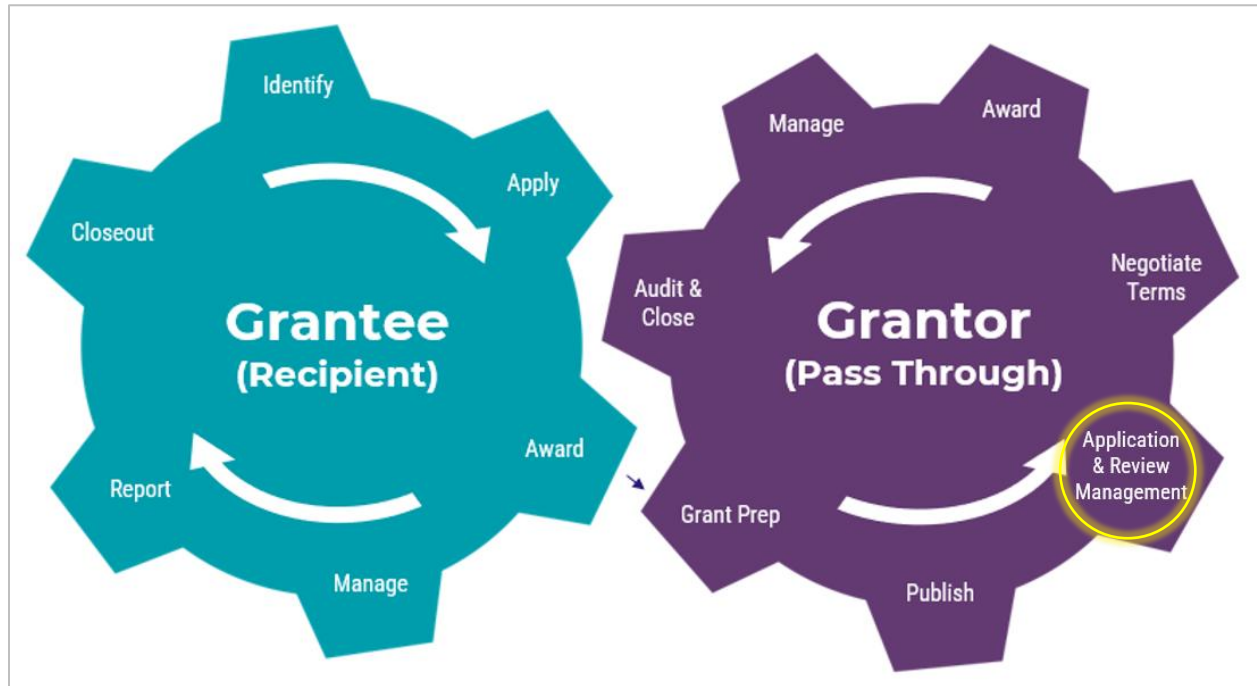
Applicants and Reviewers must obtain access to the following:

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

Lifecycle of a Grant

Full Grants Lifecycle

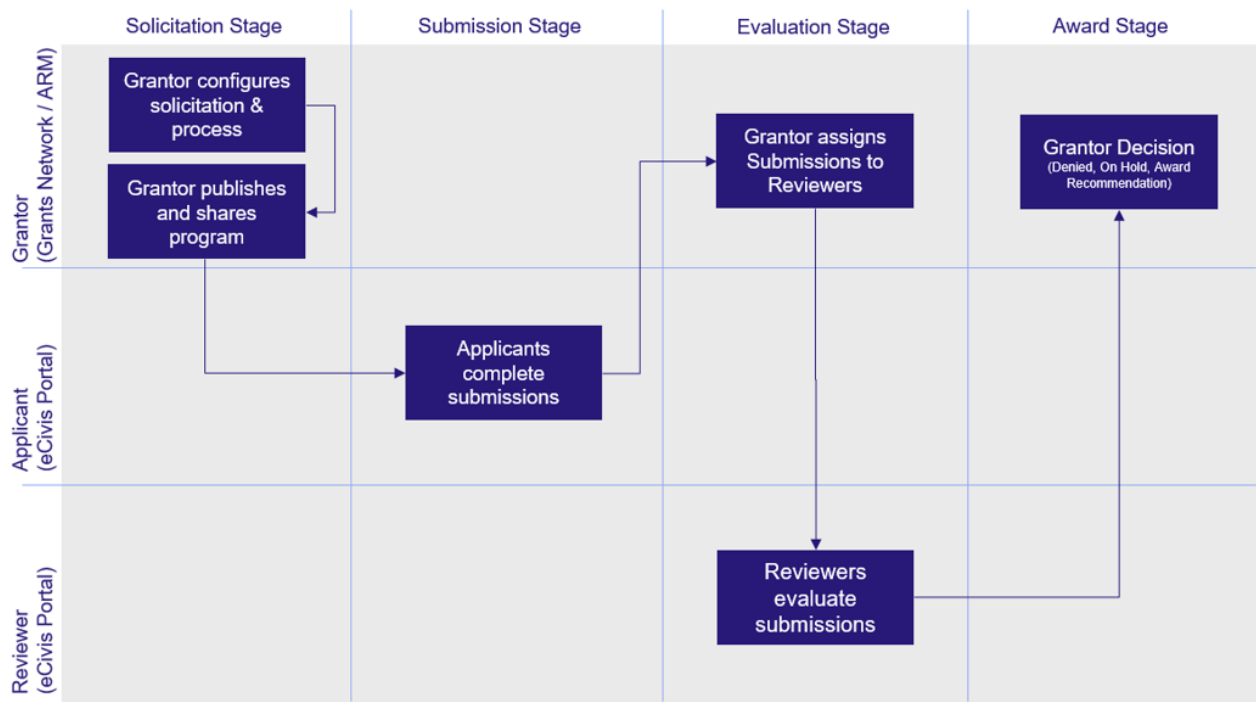
The lifecycle of a grant program depicted below outlines the process of a Grant Recipient (Grantee) managing the received funds as a Pass-Through Entity (Grantor). In the example of a competitive grant program, the Application & Review Management process involves coordinating communication among multiple 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



Roles

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

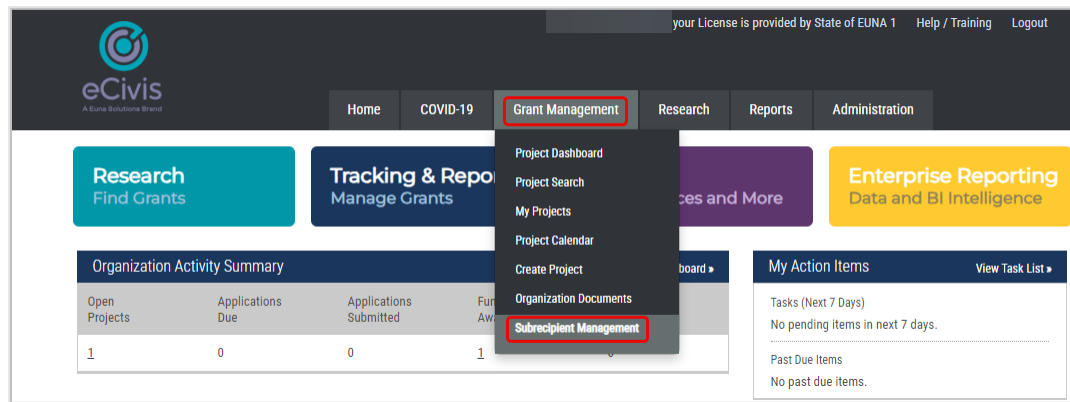
Grantor (Grantmaker)	Applicant (Grantseeker)	Reviewer
<ul style="list-style-type: none">• Utilize Grants Network to manage the Application and Review Management Process from initial Application Intake to Awarded (Recommend Award)• Set Up the Program's Application Forms• View All Program Applications, Overview Dashboard• Manage Applications, Reviews, and Reviewers• Manage Form/Process Templates	<ul style="list-style-type: none">• Utilize eCivis Portal to submit Application• Invite other Applicant Team Members• View Status of current or previous Applications	<ul style="list-style-type: none">• Utilize eCivis Portal to access Review Assignments• Reviewer Evaluates Application and submits final feedback

Create a Competitive Award Solicitation

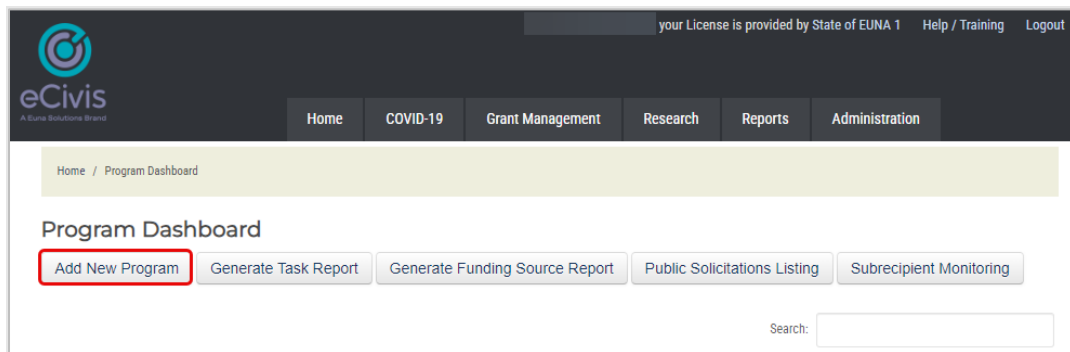
Creating a New Program

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?

Create New Program

Please enter a name for your new program:

Please select a solicitation type:

-- Select Solicitation Type --

Please select a department:

-- Select Department --

Please select a template application:

-- Select Application --

Program Setup Tip:

The information provided here assists applicants who are seeking out funding assistance. This information will be visible publicly if the "Public" radio button is checked.

Listing:

☒ Public
 ☐ Private

Is this program a subprogram?:

☐ Yes
 ☒ No

Create Program

Cancel

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

Create New Program

Please enter a name for your new program:

Economic Development FY2024 - ED

Please select a solicitation type:

Application and Peer Review Pr

Please select a department:

Economic Development

Please select a template application:

-- Select Application --

Program Setup Tip:

The information provided here assists applicants who are seeking out funding assistance. This information will be visible publicly if the "Public" radio button is checked.

Listing:

☒ Public
 ☐ Private

Is this program a subprogram?:

☐ Yes
 ☒ No

Create Program

Cancel

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

The screenshot shows the 'Program Detail' page for 'Economic Development FY2024 - ED' in a 'Draft' status. The page is divided into several sections: 1. Program Detail: Displays the program title, department (Economic Development), total funding (\$0.00), and application period (N/A). It includes four buttons: 'Subrecipient Reporting', 'Edit Solicitation', 'Application Management', and 'Delete'. 2. Award Recommendation Approval: A message stating 'You currently have no pending recommendation approvals. Click the reload button to refresh.' with a 'Reload' button. 3. Pending Awards: A message stating 'There are currently no award recommendations for this solicitation. Click the reload button to refresh.' with a 'Reload' button. 4. Pending Tasks: A message stating 'No tasks require your attention. Click the reload button to refresh.' with a 'Reload' button. 5. Subrecipient Awards: A section with a search bar and a table header. The table header includes columns for Project, Organization, Award Manager, Award/Contract Number, Award Type, Status, Contract Start, Contract End, and Total Award. Below the header, a message states 'There are currently no subrecipient awards to display.'

Home / Program Dashboard / Program Detail

Program Detail

Economic Development FY2024 - ED Draft

Department: Economic Development
Total Funding: \$0.00
Application Period: N/A

[Subrecipient Reporting](#) [Edit Solicitation](#) [Application Management](#) [Delete](#)

Award Recommendation Approval
You currently have no pending recommendation approvals. Click the reload button to refresh. [Reload](#)

Pending Awards
There are currently no award recommendations for this solicitation. Click the reload button to refresh. [Reload](#)

Pending Tasks
No tasks require your attention. Click the reload button to refresh. [Reload](#)

Show entries

Subrecipient Awards

Project	Organization	Award Manager	Award/ Contract Number	Award Type	Status	Contract Start	Contract End	Total Award
There are currently no subrecipient awards to display.								

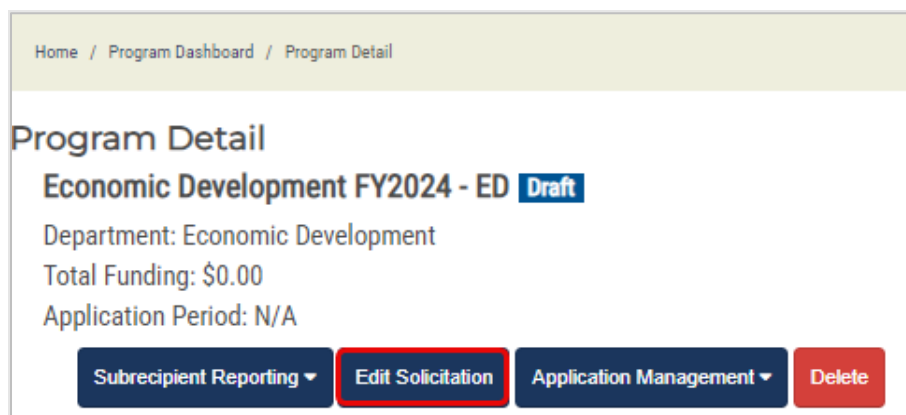
Editing the Solicitation

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



Home / Program Dashboard / Program Detail

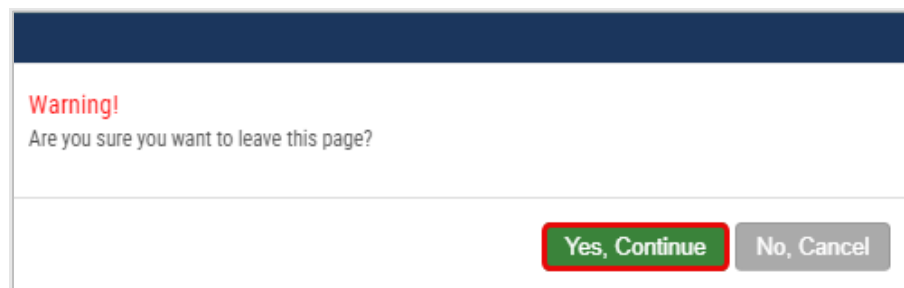
Program Detail

Economic Development FY2024 - ED Draft

Department: Economic Development
Total Funding: \$0.00
Application Period: N/A

[Subrecipient Reporting](#) [Edit Solicitation](#) [Application Management](#) [Delete](#)

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



Warning!
Are you sure you want to leave this page?

[Yes, Continue](#) [No, Cancel](#)

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.

Solicitation Edit

✖ = Incomplete ✔ = Completed

Overview ✖

Eligibility ✖

Financial ✖

Contact ✖

Files ✖

Review ✖

Submission ✖

Goals ✖

Approval ✖

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

Solicitation Edit

✖ = Incomplete ✔ = Completed

Overview ✖

Eligibility ✖

Financial ✖

Contact ✖

Files ✖

Submission ✖

Goals ✖

Approval ✖

- 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).

Economic Development FY2024 - ED05

✔ Apply

Overview

Eligibility

Financial

Contact

Files

ID:ED-2345-6789

Title:Economic Development FY2024 - ED05

Application Start Date:04/01/2024

Application End Date:06/30/2025

CFDA/ALN:12.345

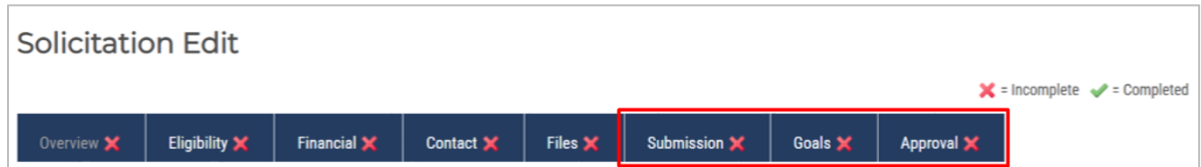
Reference URL:<https://eunasolutions.com/>

Summary:

Economic Development FY2024 - ED04 will provide small businesses with funding to support economic growth in Euna City through business coaching, training programs, and informational resources.

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

- Submission
- Goals
- Approval



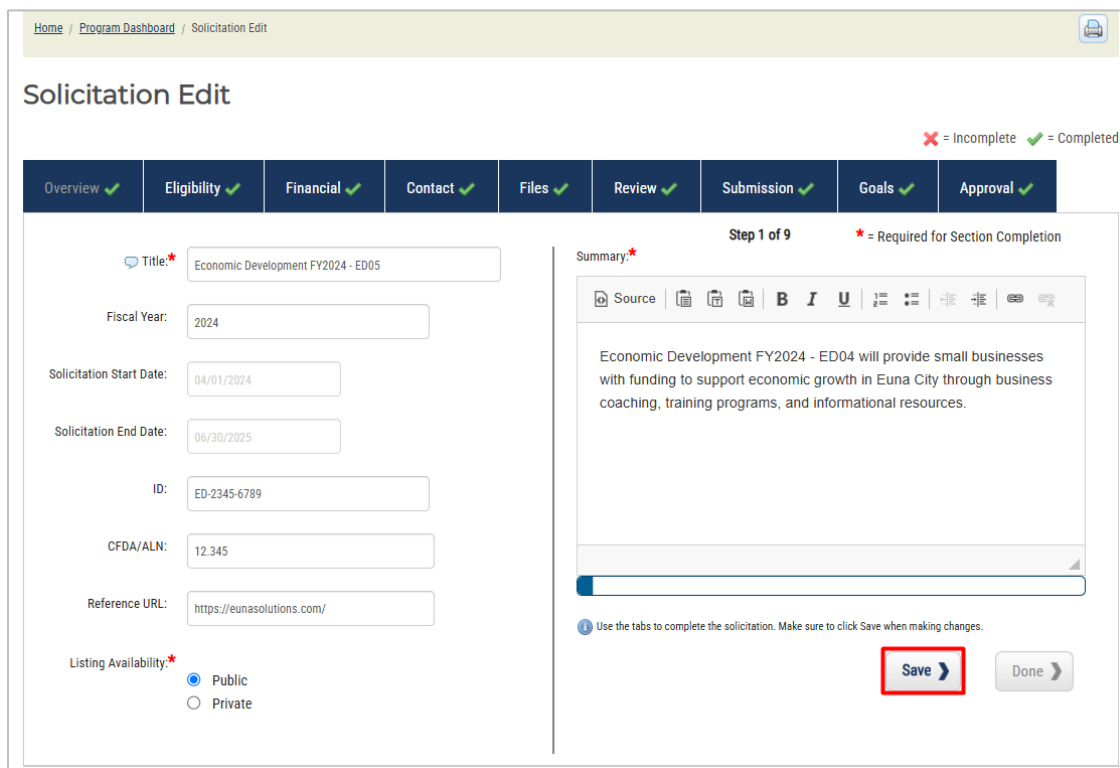
Solicitation Edit

✖ = Incomplete ✔ = Completed

Overview ✖ Eligibility ✖ Financial ✖ Contact ✖ Files ✖ Submission ✖ Goals ✖ Approval ✖

Overview Tab

The Overview Tab contains introductory details to explain your program.



Home / Program Dashboard / Solicitation Edit

Solicitation Edit

✖ = Incomplete ✔ = Completed

Overview ✔ Eligibility ✔ Financial ✔ Contact ✔ Files ✔ Review ✔ Submission ✔ Goals ✔ Approval ✔

Step 1 of 9 * = Required for Section Completion

Title* Economic Development FY2024 - ED05

Fiscal Year: 2024

Solicitation Start Date: 04/01/2024

Solicitation End Date: 06/30/2025

ID: ED-2345-6789

CFDA/ALN: 12.345

Reference URL: https://eunasolutions.com/

Listing Availability*: ☒ Public ☐ Private

Summary*
Source | B I U |
Economic Development FY2024 - ED04 will provide small businesses with funding to support economic growth in Euna City through business coaching, training programs, and informational resources.

Use the tabs to complete the solicitation. Make sure to click Save when making changes.

Save Done

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.

Home / Program Dashboard / Solicitation Edit

Solicitation Edit

✖ = Incomplete ✔ = Completed

Overview ✔ Eligibility ✔ Financial ✖ Contact ✖ Files ✖ Review ✖ Submission ✖ Goals ✖ Approval ✖

Step 2 of 9 * - Required for Section Completion

Eligible Applicants: *

☒ Local Government ☐ Other

☐ Academic Institutions ☐ Private Sector

☐ Consortia ☐ Schools/School Districts

☐ Native American Tribe ☒ State Government

☐ Non Profits

Eligibility Notes: *

Source

*Eligible Applicants only include Local Governments and State Government within EUNA State.

body p

Use the tabs to complete the solicitation. Make sure to click Save when making changes.

Save Done

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.

The screenshot shows the 'Solicitation Edit' page, Step 3 of 9, in the Financial tab. The page has a navigation bar with tabs: Overview (green check), Eligibility (green check), Financial (green check), Contact (red X), Files (red X), Review (red X), Submission (red X), Goals (red X), and Approval (red X). A legend indicates red X = Incomplete and green check = Completed. The main content area is divided into two columns. The left column contains the 'Total Funding \$1,000,000.00*' section, which includes a text box for the funding source (100% ORG0000 Small Business Development Center (SBDC) Program (\$1,000,000.00)), buttons for 'Assign Default Payment Allocation' and 'Add Funding Source', and radio buttons for 'Display the total funding amount on the external solicitation page:' (Yes/No), 'Permit Multi-Term Projects:' (Yes/No), and 'Matching Required?*' (Yes/No/Recommended). Below these are a 'Matching Type*' dropdown (set to 'Cash/In-Kind'), 'Award Amount' fields (min/max), 'Number of Awards', and 'Average Award Size'. The right column is for 'Financial Notes*', showing a text area with a note about financial documentation and a 'Save' button highlighted with a red box. A footer note says 'Use the tabs to complete the solicitation. Make sure to click Save when making changes.'

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.

The screenshot shows the 'Add Funding Source' dialog box. It has a title bar 'Add Funding Source' and a close button. The form contains: 'Choose Funding Type*' dropdown (set to 'Pass-Through Funding'), 'Please Select' dropdown (set to 'Organizational Funding Source'), 'Select Project*' dropdown, 'Select Grant*' dropdown, 'Total Available*' text box (set to '\$0.00'), and 'Total Allocation*' text box. At the bottom are 'Save Funding' and 'Close' buttons.

- 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.

Allocation Option

Are awarded funds to be available for use as pass-through funding? ☐ No ☒ Yes

Amount to earmark for pass-through funding:

Are awarded funds to be available for Allocation to sub-projects? ☒ No ☐ Yes

- 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 dropdown 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.

Home / Program Dashboard / Solicitation Edit

Solicitation Edit

✖ = Incomplete ✔ = Completed

Overview ✔ Eligibility ✔ Financial ✔ Contact ✔ Files ✖ Review ✖ Submission ✖ Goals ✖ Approval ✖

Step 4 of 9 ✖ = Required for Section Completion

Agency/Department: Economic Development

Contact/Help: *

Office:

Program Contact: *

Anthony Torres
Demo Small Business Administration Agency
12345 Main Street
Pasadena, California 91001
Anthony.Torres@eunasolutions.com

☒ Program Contact & Application Address are the same.

Application Address: *

Anthony Torres
Demo Small Business Administration Agency
12345 Main Street
Pasadena, California 91001
Anthony.Torres@eunasolutions.com

Contact Notes: *

Source

For Application assistance please refer to FAQ's document. If further assistance is needed, please send inquiries via email to Program Contact. Thank You!

body p

Use the tabs to complete the solicitation. Make sure to click Save when making changes.

Save Done

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.

Home / Program Dashboard / Solicitation Edit

Solicitation Edit

✖ = Incomplete ✔ = Completed

Overview ✔ Eligibility ✔ Financial ✔ Contact ✔ Files ✔ Review ✖ Submission ✖ Goals ✖ Approval ✖

Step 5 of 9 * = Required for Section Completion

Current Files

NOFA:	NOFA	(11.5 Kb)	
FAQ:	FAQs	(11.5 Kb)	

[Add File](#)

Application Submission Notes:

N/A

File Notes:

1. NOFA: Application Information

2. FAQ's: Please refer for assistance. Updated as of 04/29/24.

[Save](#) [Done](#)

body p

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.

The screenshot shows the 'Solicitation Edit' page at 'Step 6 of 9'. The breadcrumb trail is 'Home / Program Dashboard / Solicitation Edit'. A legend indicates 'X = Incomplete' and '✓ = Completed'. The navigation tabs are: Overview ✓, Eligibility ✓, Financial ✓, Contact ✓, Files ✓, Review ✓, Submission X, Goals X, and Approval X. The 'Review' tab is active. The main heading is 'Please enter review committee members:'. Below it is a 'Review Committee' table with two rows: 'John Doe' and 'Jane Doe euna.reviewer@gmail.com'. Each row has a red asterisk icon in the right column. An 'Add Reviewer' button is below the table. To the right, a text area for 'Review notes' is shown with a rich text editor toolbar. A note states: 'Review notes may be used to provide instructions to your customer service representative that will help them in designing the application and submission process for your solicitation. Once you have marked your solicitation complete, your customer service representative will follow up within one business day to confirm your program details. These notes will not appear to applicants.' At the bottom, a message says 'Use the tabs to complete the solicitation. Make sure to click Save when making changes.' There are 'Save' and 'Done' buttons at the bottom right.

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.

Home / Program Dashboard / Solicitation Edit

Solicitation Edit

✖ = Incomplete ✔ = Completed

Overview ✔ Eligibility ✔ Financial ✔ Contact ✔ Files ✔ Review ✔ Submission ✔ Goals ✖ Approval ✖

Step 7 of 9 * - Required for Section Completion

Accept multiple applications per user.*
☒ Yes ☐ No
Note: Once a solicitation has been published, this selection may not be changed.

Budget Development.*
Would you like your applicants to create a budget within the eCivis Portal? This will also be used to track spending during post award.
☒ Yes ☐ No
Note: Once a solicitation has been published, the budget template may not be changed.
SF-424A Non-Construction

Contract Number.*
Would you like to have Grants Network autogenerate a contract number when an award is made?
☐ Yes ☒ No
Prefix:
Note: Contract Number prefix must be unique for your Organization. A -XXXX will be appended to all contract numbers.

☐ Collect Detailed Financial Reports ⓘ
☐ Require Invoice Number on financial reports
☐ Require Receiver ID on financial reports
☒ Track program income with Finance Reports
☒ Additive
☐ Subtractive
☐ Apply to match

Submission notes may be used to provide instructions to your customer service representative that will help them in designing the application and submission process for your solicitation. Once you have marked your solicitation complete, your customer service representative will follow up within one business day to confirm your program details. These notes will not appear to applicants.

Note: All application submission deadlines default to 11:59 EST. If you would like your application period to close at a different time, please indicate the time and time zone, in the notes section below.

body p

Use the tabs to complete the solicitation. Make sure to click Save when making changes.

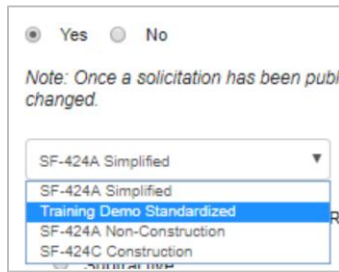
Save Done

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

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



☒ Yes ☐ No

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

SF-424A Simplified ▼

- SF-424A Simplified
- Training Demo Standardized
- SF-424A Non-Construction
- SF-424C Construction

***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).

The screenshot shows the 'Goals' tab within a multi-step process. The top navigation bar includes tabs: Overview, Eligibility, Financial, Contact, Files, Review, Submission, Goals (active), and Approval. Below the tabs, it indicates 'Step 8 of 9' and a red asterisk note: '* - Required for Section Completion'. A message states: 'Please enter the goals you have for this program. These goals will be included in the application and post award process.' There is an 'Add New Goal' button and a search bar. Below is a table with columns 'Goal', 'Target', and 'Actions'. The table is currently empty, showing 'No goals currently exist for this solicitation'. At the bottom of the table area, there is a '10 records per page' dropdown and 'Previous'/'Next' navigation buttons. Below the table is a text area for 'Goal notes' with a rich text editor toolbar. At the bottom right, there are 'Save' and 'Done' buttons.

***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.

Please enter the goals you have for

Add New Goal

Add Solicitation Goal

Goal Title:* Persons Served

Target Units:* 12,000.00

Save Goal **Close**

- 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.

Edit Solicitation Goal

Goal Title:* Persons Served

Target Units:* 12,000.00

Add Subgoal

Subgoal Title:* Adults Served (Over 65)

Save Subgoal **Cancel**

Subgoal	Actions
Adults Served (Under 65)	Edit Delete
Youth Served	Edit Delete

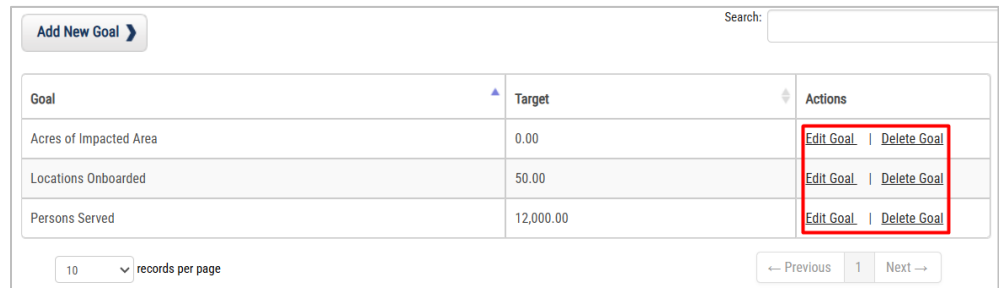
Close

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



A modal window with a header containing 'Edit' and 'Delete' links. The main area contains a 'Save Goal' button with a right-pointing arrow, which is highlighted with a red rectangle, and a 'Close' button to its right.

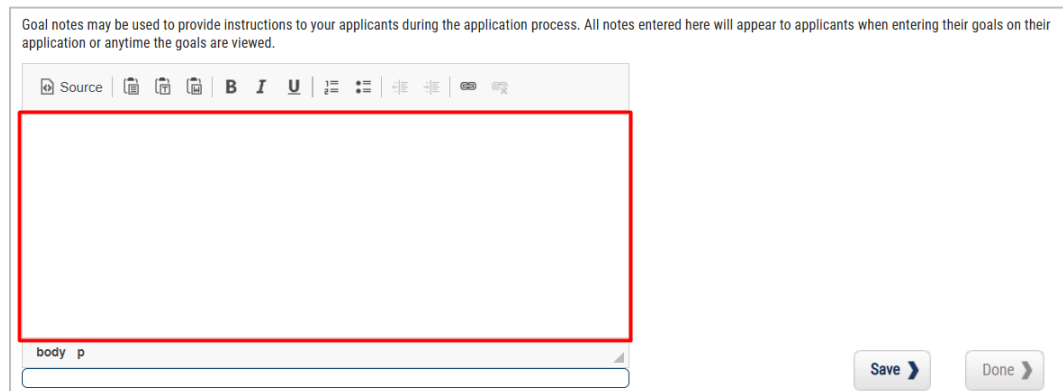
- iii. You may edit or remove goals until they are used by applicants and subrecipients to store data:



The Goals management interface includes an 'Add New Goal' button, a search bar, and a table with columns for Goal, Target, and Actions. The table lists three goals: 'Acres of Impacted Area' (0.00), 'Locations Onboarded' (50.00), and 'Persons Served' (12,000.00). Each row has 'Edit Goal' and 'Delete Goal' links in the Actions column, which are highlighted with a red rectangle. At the bottom, there is a '10 records per page' selector and pagination controls for 'Previous', '1', and 'Next'.

Goal	Target	Actions
Acres of Impacted Area	0.00	Edit Goal Delete Goal
Locations Onboarded	50.00	Edit Goal Delete Goal
Persons Served	12,000.00	Edit Goal Delete Goal

- 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.



The Goal Notes editor includes a text area with a rich text toolbar (Source, Bold, Italic, Underline, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Undo, Redo) and a 'body p' text box. A red rectangle highlights the main text area. At the bottom right are 'Save' and 'Done' buttons with right-pointing arrows.

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.

Solicitation Edit

✖ = Incomplete
✔ = Completed

Overview ✔
Eligibility ✔
Financial ✔
Contact ✔
Files ✔
Review ✔
Submission ✔
Goals ✔
Approval ✔

Step 9 of 9

✖ = Required for Section Completion

Please define an approval workflow for each of the tasks below*

Task Type	Approver	Workflow
Recommendation Approval ⓘ	Program Admin Approval	Standard
Final Award Approval ⓘ	Program Admin Approval	Standard
Activity Report Approval ⓘ	Program Admin Approval	Standard
Financial Report Approval ⓘ	Program Admin Approval	Standard
Amendment Approval ⓘ	Program Admin Approval	Standard
Amendment Approval with Finance ⓘ	Program Admin Approval	Standard
Grantor Amendment Approval ⓘ	Program Admin Approval	Standard
Grantor Amendment Approval With Finance ⓘ	Program Admin Approval	Standard
Grantor Amendment Final Approval ⓘ	Program Admin Approval	Standard
Return of Funds Approval ⓘ	Program Admin Approval	Standard
Closeout Approval ⓘ	Program Admin Approval	Standard

Award Files may be optionally added. These would include common program documents that the subrecipient needs to complete the award process. 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.

Award Files

No data available in table

Add File ➤

Task Notifications
Do you want to send reminder emails to subrecipients for upcoming and past due tasks? ⓘ

☐ None
☒ Weekly

☒ Financial Reports
☒ Activity Reports
☒ Miscellaneous Tasks
☒ CAP Tasks

ⓘ Use the tabs to complete the solicitation. Make sure to click Save when making changes.

Save ➤

Done ➤

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.

Task Type	Approver	Workflow
Recommendation Approval ⓘ		Undefined

- 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.

Select Approval Workflow

Define a workflow for the Award Recommendation Approval Task

Approval Type:*

☒ Standard ☐ Sequential

Designated for Approval:*

☐ User
Choose a user that will be designated as approver

Select Department

Select User

☒ User Group
Choose a user group that will be designated for approval. The group is based off Approval Type selected above.

Select User Group

Select User Group

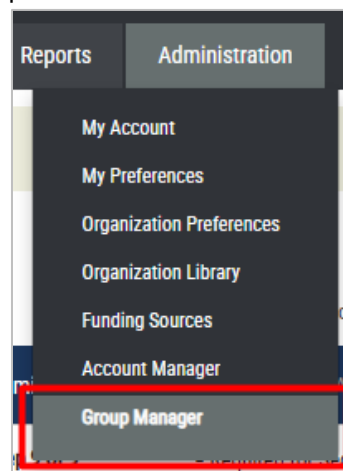
Program Admin Approval

Save >

Close >

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.

	Group Name	Description	Type	Members
1	Program Admin Approval		standard	A Trainer

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

Group Name *: Program Admin Approval

Description: This program will be used for all award approvals across all programs
431 Characters Left

Type *: ☒ Standard ☐ Sequential

Select from Department, Users, and Groups

Select one or more departments on the left to narrow the list of users on the right, or select from the list of user groups.

Departments:

- TRAINING -
- Administration
- Community Development
- Economic Development
- Education
- Emergency Management
- Finance
- Health and Human Services

Users:

- A Trainer (anthony.torres@eunasolutions.com)
- CS CS Rep (anthony.torres@eunasolutions.com)
- Jane Smith (julia.malott@eunasolutions.com)

Group Members:

- A Trainer (anthony.torres@eunasolutions.com)
- Jane Smith (julia.malott@eunasolutions.com)

Save **Cancel**

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).

The screenshot shows a table titled 'Program Solicitations' with columns: Department, Title, Program Type, Status, Total Funding, and Actions. A row is highlighted for 'Economic Development' with title 'Economic Development FY2024 - ED01', status 'Draft', and total funding '\$1,000,000.00'. The 'Actions' dropdown menu is open, showing options: View detail, Edit Solicitation, Application and Review Manager (highlighted), and Delete. The table also includes a search bar with 'ed01', a 'Show 25 entries' dropdown, and a 'Hide Archived Programs' checkbox.

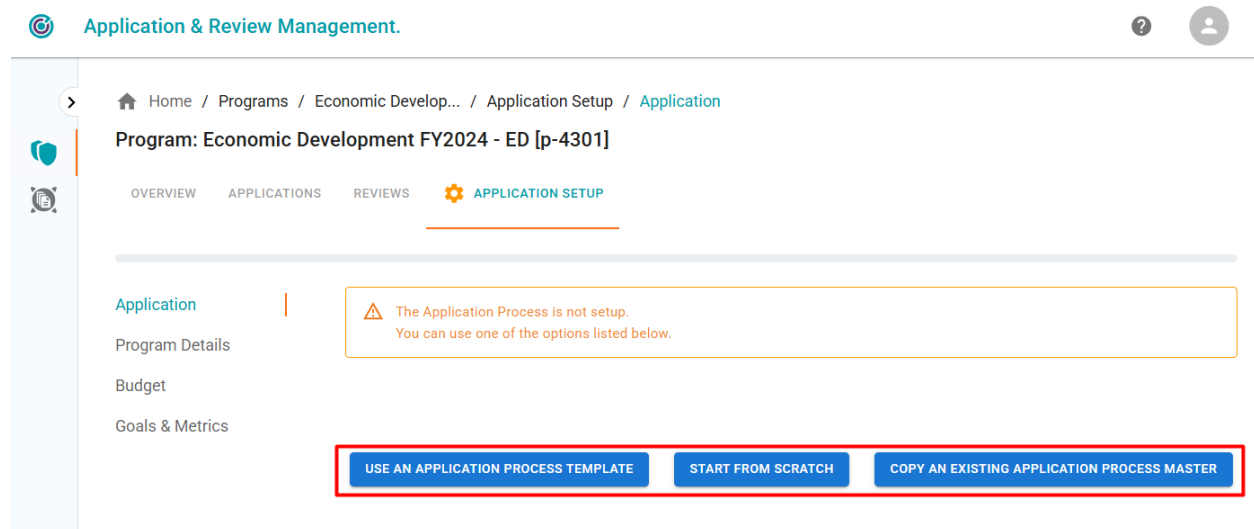
Grant Management Tab > Subrecipient Management > Program Dashboard > Program Solicitations > Program Detail Page > Application & Review Manager Button

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**.

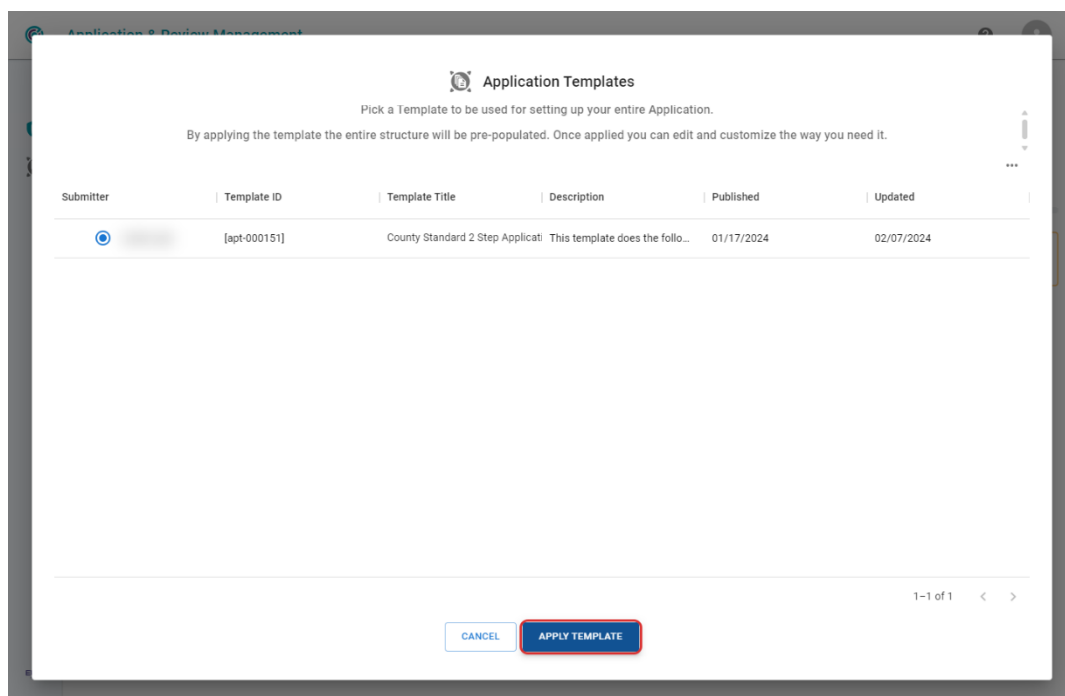
The screenshot shows the 'Program Detail' page for 'Economic Development FY2024 - ED01' in 'Draft' status. It displays the department 'Economic Development', total funding '\$1,000,000.00', and application period 'N/A'. At the bottom, there are four buttons: 'Subrecipient Reporting', 'Edit Solicitation', 'Application Management' (highlighted), and 'Delete'. A dropdown menu from 'Application Management' shows the 'Application and Review Manager' option highlighted.

Selecting the Application Setup Method

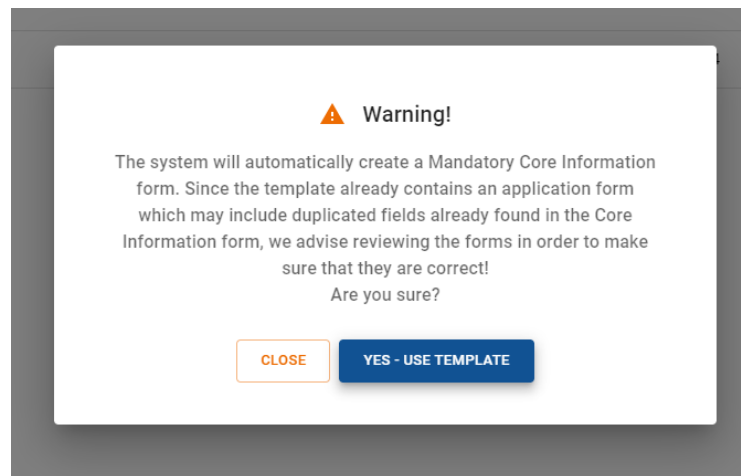
You will begin by selecting whether you will use another Application Process stored in your system or **Start From Scratch**. The three options will behave as follows:





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.



- 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)

Entity	Type	BL	Instru
✓  Economic Development FY2024 - ED02 [apm-000345]	APPLICATION PROCESS	--	

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.

Copy an actual Application Process Master

Pick an actual Application Process from the list of programs below to be copied into your program. The entire structure will be copied (stages, forms, etc.). Once it is created, you can edit and customize it as needed.

Programs List



community SEARCH

Program	Department	App Setup Status
<input type="radio"/> Community Development FY2024 [p-36]	Administration	✓
<input checked="" type="radio"/> Economic Development - ED Test [p-493]	Community Development	✓

1-2 of 2 < >

CANCEL COPY

***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.

 Dates from the originally copied program have been cleared. The Application Process start date has been set to today and the end date has been set to 90 days from today. Please be sure to modify the Application Process date range and adjust any Submission Stage and Evaluation Stage dates as required. 

- 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

Entity	Type	BL	Instructions	Start	End	Usage & Actions
Application Process for Pr... [apm-000656]	APPLICATION PROCESS	⚙️	ℹ️	04/05/2025	07/04/2025	🗑️ ADD STAGE ▾
Application Submission [ssm-001310]	Submission Stage	--	ℹ️	--	--	🗑️ ADD FORM ▾
Core Information [afm-002400]	Application Form	--	ℹ️	--	--	🗑️
Review Period [esm-001311]	Evaluation Stage	--	ℹ️	--	--	🗑️ ADD FORM ▾
Review Form [rfm-002401]	Review Form	--	ℹ️	--	--	🗑️

- 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”

ℹ️ **The minimal setup required to publish your solicitation has been achieved.**

- Please continue to add more stages and forms, and set the business logic as needed. When done, click the Ready to Publish button in the settings to complete the process.
- After marking as Ready to Publish, you will be able to publish your solicitation in Grants Network.

Therefore verify twice if everything is setup correctly before you publish the settings.

Last edited by: A Trainer, 04/05/2025 07:30AM

READY TO PUBLISH

Entity	Type	BL	Instructions	Start	End	Usage & Actions
Application Process for Pr... [apm-000656]	APPLICATION PROCESS	⚙️	ℹ️	04/05/2025	07/04/2025	🗑️ ADD STAGE ▾

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

Application Process for Program: Economic Development FY2024 - ED / unsaved

/ You (EunaState1-OMAH1) editing now.

SAVE

CANCEL

Settings

APPLICATION PROCESS META SETTINGS & INFO ^

Application Process Name *

Application Process for Program: Economic Development FY2024 - ED

Program Name

Economic Development FY2024 - ED

Application Process ID

Program ID

4301

Application Process Overall Instructions *

Normal

B

I

U

S

=

|=|

X

Applicants will need to

Start Date

End Date

04/05/2025 07:07 AM

07/04/2025 07:07 AM

Submission Stage

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

Program: Economic Development FY2024 - ED02 [p-4300]

Home / Programs / Economic Development FY2024 - ED02 [p-4300] / Application Setup / Application

OVERVIEW APPLICATIONS REVIEWS **APPLICATION SETUP**

Application

Program Details

Budget

Goals & Metrics

The Application Process is not finalized.
Add at least a SUBMISSION STAGE (the mandatory Core Information Form will be automatically attached to your first Submission Stage)

Last edited by: Anthony Torres, 04/23/2024 10:31AM

READY TO PUBLISH

Submission stage was successfully deleted.

Entity	Type	BL	Instructions	Start	End	Usage & Actions
Economic Development FY2024 - ED02 [apm-000202]	APPLICATION PROCESS	--	ⓘ	04/01/2024	01/01/2025	ADD STAGE Submission Stage - From Scratch Submission Stage - 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].

Submission Stage Templates

Pick a Template to be used for setting up your Submission Stage.

By applying the template the entire structure will be pre-populated. Once applied you can edit and customize the way you need it.

Submitter	Template ID	Template Title	Description	Published	Updated
<input checked="" type="radio"/>	[sst-000657]	Project Information Submission	This template is used in a sta...	10/09/2024	10/09/2024
<input type="radio"/>	[sst-000289]	Intent to Apply Submission	This template has a single fo...	01/17/2024	10/09/2024

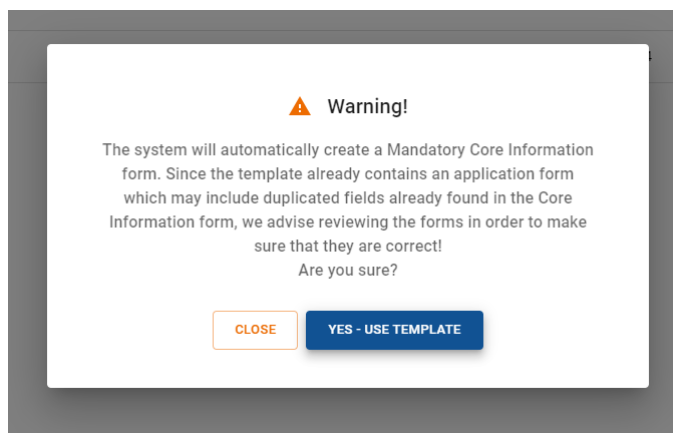
1-2 of 2

CANCEL APPLY TEMPLATE

- 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)

Entity	Type	BL	Instruction
▼ Economic Development FY2024 - ED02 [apm-000345]	APPLICATION PROCESS	--	
1 ▼ Project Information Submission [sm-000661]	Submission Stage	--	--
Core Information [afm-001102]	Application Form	--	

- 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.

The screenshot shows the 'Application & Review Management' interface. The 'Application Setup' tab is active, displaying a table of application stages. The 'Core Information' form is highlighted in the table.

Entity	Type	BL	Instructions	Start	End	Usage & Actions
Application Process for Pr... [apm-000354]	APPLICATION PROCESS	-	ⓘ	10/24/2024	01/22/2025	ADD STAGE
Intent to Apply [ssm-000677]	Submission Stage	-	ⓘ	-	-	ADD FORM
Core Information [afm-001141]	Application Form	-	ⓘ	-	-	

3. Click **Edit**.

The screenshot shows the 'Application Form: Core Information [afm-000775]' edit screen. The 'EDIT' button is highlighted in the top right corner.

Application Form: Core Information [afm-000775]

SETUP FORM | PREVIEW FORM

Last edited by: [User] 11/2024 07:58AM

Form Layout

FORM META SETTINGS & INFO

Form Name: Core Information | Form ID: afm-000775

Program Name: Economic Development FY2024 - ED02 | Submission Stage: Intent to Apply

Form Instructions: Fill out Core Information

Form Elements Toolbox

- LAYOUT
- TYPOGRAPHY
- CONTROLS
- UPLOAD/DOWNLOAD

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.)

Application Form: Intent to Apply [afm-001141] / **unsaved**

[SETUP FORM](#) [PREVIEW FORM](#)

Last edited by: A Trainer, 10/24/2024 05:48PM

Form Layout

FORM META SETTINGS & INFO ^

Form Name * Intent to Apply Form ID * afm-001141

Program Name Economic Development FY2024 - ED01 Submission Stage Intent to Apply Submission

Form Instructions * Fill out the below information to be reviewed for eligibility.

Drag and drop form elements in this drop zone to build your form. This form is not containing business logic at this time

Application (ff-052257) Project Title (ff-052258) *

ORGANIZATION SUBMITTING APPLICATION

Form Elements Toolbox

Three Column Row

Four Column Row

TYPOGRAPHY ^

Instructions

Header Text

Paragraph

Label

Tags

Website

CONTROLS ^

Single Line Input

Paragraph Input

Email Input

Phone Number

Number Input

Dropdown

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

Application Form: Intent to Apply [afm-001141] / **unsaved**

[SETUP FORM](#) [PREVIEW FORM](#)

You can test your form, fill it with content, see if business logic works, etc. Anything you input will be not saved in reality, this is only for the master form testing.

[PRINT FORM PDF](#) [TEST FORM](#) [RESET](#)

Instructions

Fill out the below information to be reviewed for eligibility.

Application

Status [-]

Project Title * Regional Business Support Project

ORGANIZATION SUBMITTING APPLICATION

Organization Name * City of Euna

Employer Identification Number (EIN) Unique Entity Identifier (UEI) DUNS Number

- 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**

Entity	Type	BL	Instructions	Start	End	Usage & Actions
▼ Economic Development FY2024 - ... [apm-000202]	APPLICATION PROCESS	--	①	04/01/2024	01/01/2025	ADD STAGE ▼
▼ Intent to Apply [sam-000395]	Submission Stage	--	①	04/01/2024	08/01/2024	ADD FORM ▼
▼ Intent to Apply Form [afm-000728]	Application Form	--	①	--	--	Application Form - From Scratch Application Form - 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].

Submitter	Template ID	Template Title	Description	Published	Updated
<input type="radio"/>	[baft-001092]	Project Information	This form is meant to captur...	10/09/2024	10/09/2024
<input checked="" type="radio"/>	[baft-001094]	Project Information Form	This is the standard form for ...	10/09/2024	10/09/2024
<input type="radio"/>	[baft-001095]	Project Information	This is a standard form	10/09/2024	10/09/2024

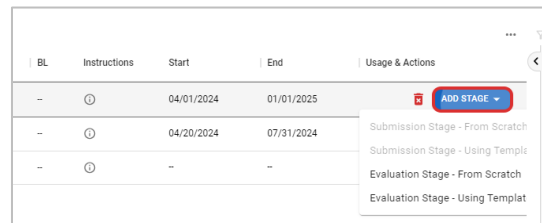
- i. Click **Apply Template**
- ii. Click the name of the Form to access the edit options (Continue to the next section for further instructions)

1	▼	 Project Information Submission [ssm-000661]	Submission Stage
		 Core Information [afm-001102]	Application Form
		 Project Information [afm-001101]	Application Form

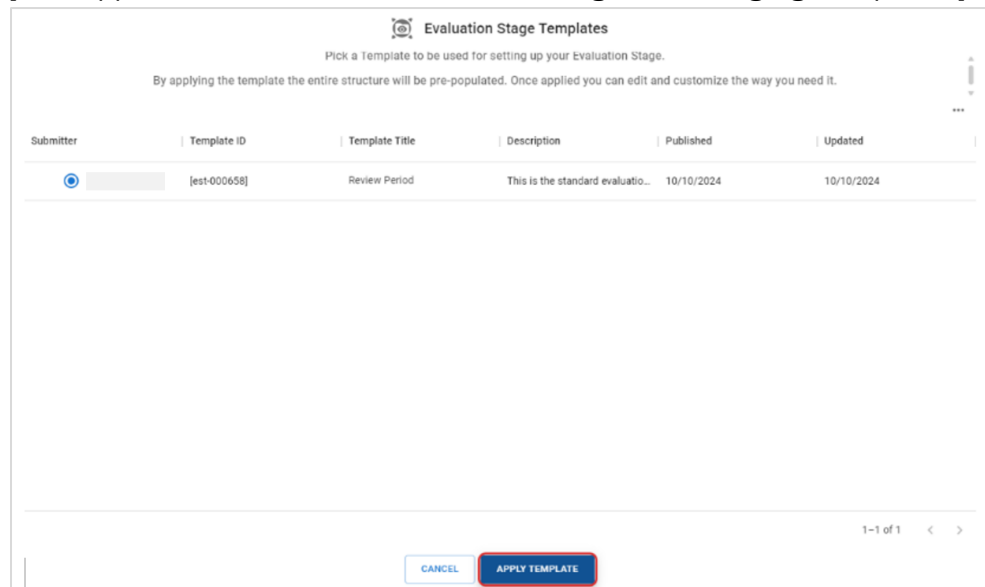
***Note:** If you would like to copy an application form from another program into this program, you may do so by copying the existing form into the Templates section. That Application Form Template can then be used in this and other new programs. (See the “Copying Existing Forms to Form Templates” section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

Evaluation Stage

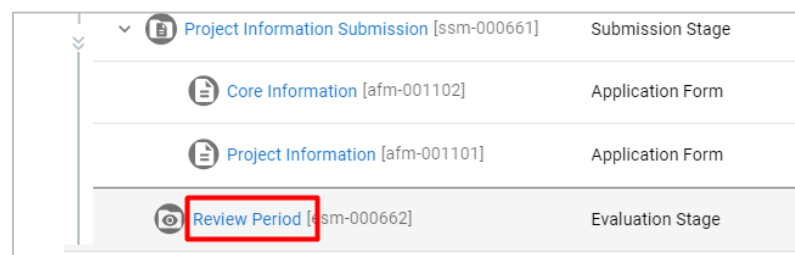
1. Click **Add Stage**
2. Add an Evaluation Stage and select **From Scratch** or **Using Template**



- 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)



- 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**

SETUP STAGE SET CONTENT TO REVIEW

Last edited by: A Trainer, 12/20/2024 09:44AM / You (EunaState1-OMAH1) editing now. SAVE CANCEL

Settings

APPLICATION PROCESS META SETTINGS & INFO ^

Stage Name *	Stage ID
Review Period	esm-000408
Program Name	Program ID
Economic Development FY2024 - ED05	4299

Instructions *

Normal **B** *I* U ~~S~~

Reviewers must submit a Project Information Review Form for each submission assigned.

Start Date	End Date
04/01/2025 12:00 AM	06/30/2025 02:59 PM

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.

The screenshot shows the 'Evaluation Stage: Eligibility Check' settings page. At the top, there is a navigation bar with a back arrow, the title 'Evaluation Stage: Eligibility Check', and a status indicator 'unsaved'. Below this, there are two tabs: 'SETUP STAGE' and 'SET CONTENT TO REVIEW'. The 'SET CONTENT TO REVIEW' tab is highlighted with a red box. Below the tabs, it says '/ You (EunaState1-OMAH1) editing now.' At the bottom, there is a 'Settings' section and a link for 'APPLICATION PROCESS META SETTINGS & INFO'.

2. Click **Edit**

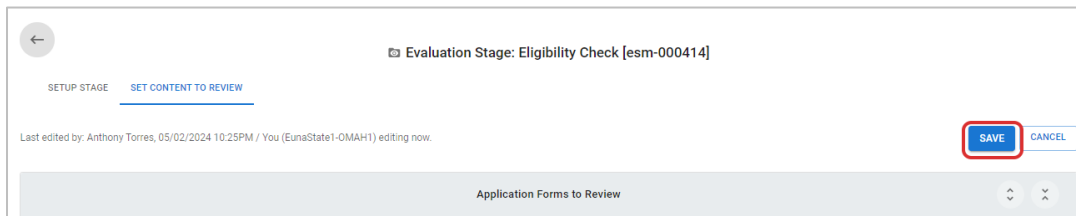
The screenshot shows the 'Set Content to Review' tab with the 'Application Forms to Review' section. The title 'Evaluation Stage: Eval Stage [esm-000048]' is highlighted with a red box. In the top right corner, there is an 'EDIT' button, also highlighted with a red box. The section contains a list of application forms to review, with a checkbox next to each form name. The first form is 'Core Information - (afm-000059)'. Below it, there are fields for 'Application' (with a dropdown menu) and 'Project Title'. The 'ORGANIZATION SUBMITTING APPLICATION' section is also visible at the bottom.

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.

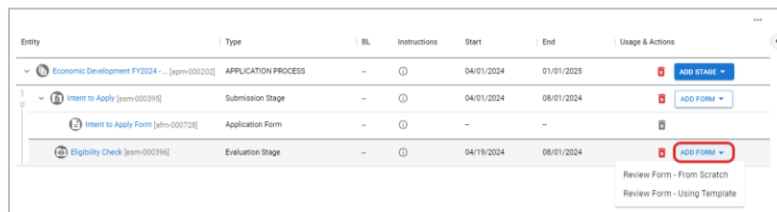
The screenshot shows the 'Set Content to Review' tab with the 'Application Forms to Review' section. The title 'Evaluation Stage: Eligibility Check [esm-000414]' is visible. In the top right corner, there are 'SAVE' and 'CANCEL' buttons. The section contains a list of application forms to review, with checkboxes next to each form name. The first form is 'Intent to Apply Form - (afm-000751)', which has its checkbox selected. Below it, there are fields for 'Application' (with a dropdown menu) and 'Project Title'. The 'ORGANIZATION SUBMITTING APPLICATION' section is also visible at the bottom, with a checkbox selected next to 'Organization Name'.

4. Click **Save**



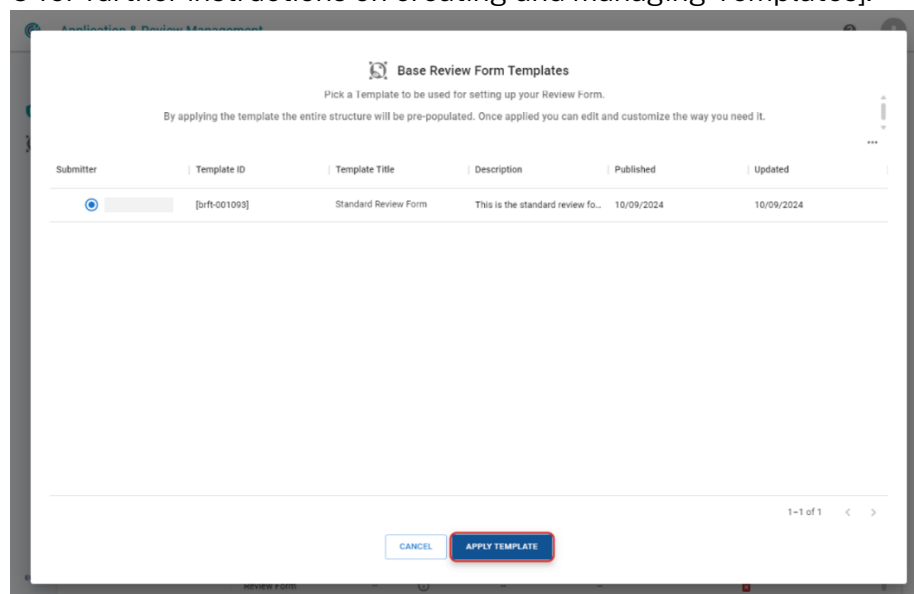
Review Form

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**



Entity	Type	BL	Instructions	Start	End	Usage & Actions
Economic Development FY2024 - [esm-000202]	APPLICATION PROCESS	--	ⓘ	04/01/2024	01/01/2025	ADD STAGE +
Intent to Apply [esm-000395]	Submission Stage	--	ⓘ	04/01/2024	08/01/2024	ADD FORM +
Intent to Apply Form [esm-000728]	Application Form	--	ⓘ	--	--	
Eligibility Check [esm-000396]	Evaluation Stage	--	ⓘ	04/19/2024	08/01/2024	ADD FORM + Review Form - From Scratch Review Form - 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].



Base Review Form Templates

Pick a Template to be used for setting up your Review Form.

By applying the template the entire structure will be pre-populated. Once applied you can edit and customize the way you need it.


Submitter	Template ID	Template Title	Description	Published	Updated
	[brft-001093]	Standard Review Form	This is the standard review fo...	10/09/2024	10/09/2024

1-1 of 1

APPLY TEMPLATE

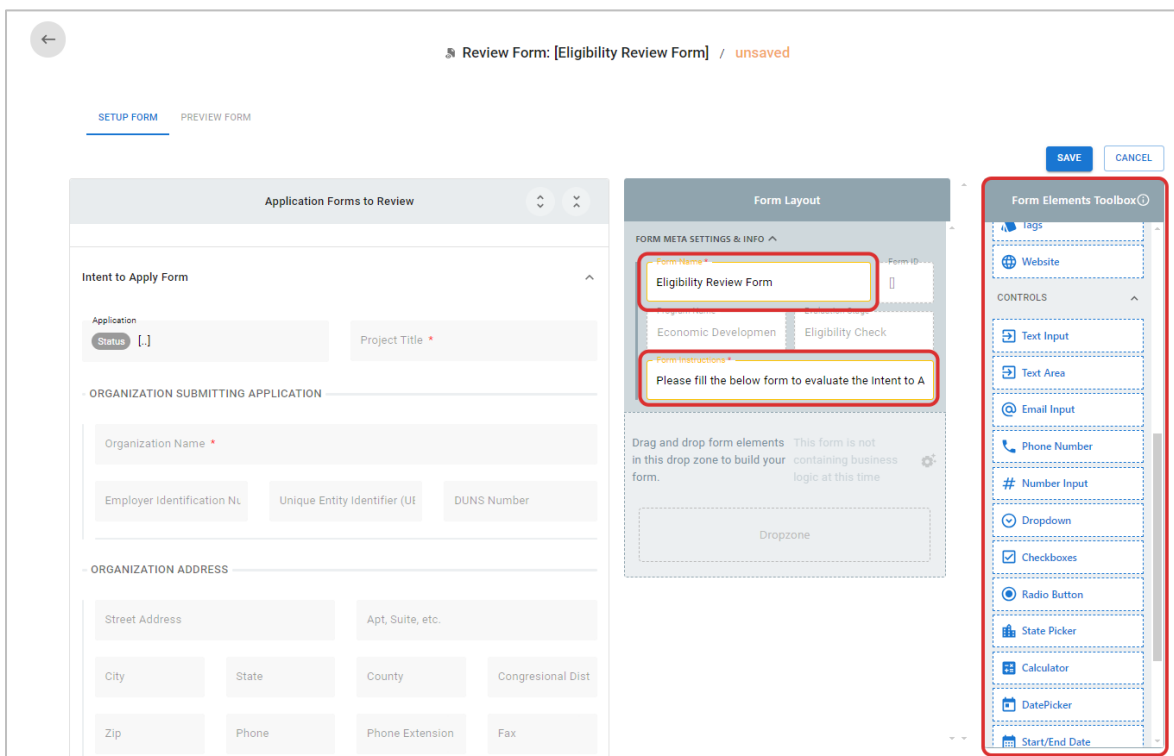
- iii. Click **Apply Template**

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

▼	 Review Period [esm-000662]	Evaluation Stage
	 Standard Review Form [rsm-001103]	Review Form

***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]

The top part of the image shows a configuration window for a form field. It includes an 'Inline help' box with the text 'Rate this field on a scale of 1-10 with 10 being the highest.' Below this, there is a section titled 'Include in Total Score' with a checked checkbox. Underneath, there are two input fields: 'Minimum Value' with the value '1' and 'Maximum Value' with the value '10'. Below these fields are 'PRINT OPTIONS' with checkboxes for 'Page Break Before Element' and 'Display on alternate/signature Page'.

The bottom part of the image shows a preview of the form. It includes fields for 'Phone Extension' and 'Title'. A 'Sustainability Plan Score' field contains the value '7'. Below it, a 'Sustainability Plan Comments' field contains the text 'The applicant provided strong evidence of their sustainability plan within their attached spreadsheet model'. At the bottom right, a 'Total Score' field displays '17 / (out of 20)'.

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.

The screenshot shows the 'Review Form: Project Information Review Form [rfm-000741]' interface. At the top, there is a 'SETUP FORM' section with a 'PREVIEW FORM' button highlighted by a red box. Below this, a message states: 'You can test your form, fill it with content, see if business logic works, etc. Anything you input will be not saved in reality, this is only for the master form testing.' To the right of this message are three buttons: 'PRINT FORM PDF', 'TEST FORM', and 'RESET', all highlighted by a red box.

The main area is divided into two panels. The left panel, titled 'Application Forms to Review', shows a list of forms. The first form is 'Intent to Apply Form'. It has fields for 'Application' (with a 'Status' dropdown set to '...'), 'Project Title' (marked with a red asterisk), and 'ORGANIZATION SUBMITTING APPLICATION'. Below this, there are fields for 'Organization Name' (marked with a red asterisk), 'Employer Identification...', 'Unique Entity Identifier...', and 'DUNS Number'.

The right panel, titled 'Reviewed by: test 0% completed', shows the 'Instructions' section. It contains the text 'Please fill the below form to evaluate the Intent to Apply submission for eligibility.' Below this, there is a field for 'Addresses Priority Area A' with the value '8'. Below this field, there is a 'Priority Area A Comments' field containing the text 'This explanation does an excellent job at drawing connections to priority area A'.

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

Review Form: [Eligibility Review Form] / **unsaved**

SETUP FORM PREVIEW FORM

Application Forms to Review

Intent to Apply Form

Form Layout

FORM META SETTINGS & INFO

Form Name: Eligibility Review Form

Form ID

Form Elements Toolbox

Tags

Website

CONTROLS

SAVE CANCEL

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

i The minimal setup required to publish your solicitation has been achieved.

- Please continue to add more stages and forms, and set the business logic as needed. When done, click the Ready to Publish button in the settings to complete the process.
- After marking as Ready to Publish, you will be able to publish your solicitation in Grants Network.

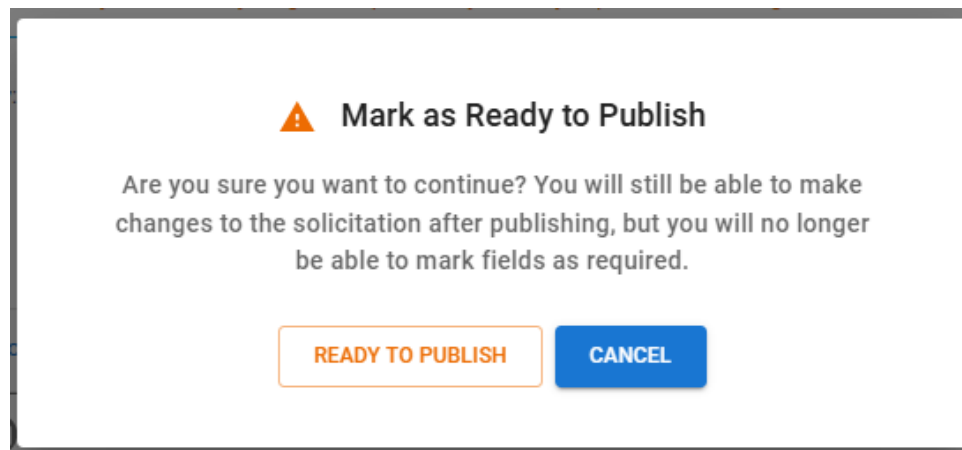
Therefore verify twice if everything is setup correctly before you publish the settings.

Last edited by: Anthony Torres, 10/15/2024 10:30PM

↑ READY TO PUBLISH

Entity	Type	BL	Instructions	Start	End
Economic Development F... [apm-000345]	APPLICATION PROCESS	--		10/16/2024	01/14/2025
1 Project Information S... [esm-000663]	Submission Stage	--	--	--	--

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.

Program Solicitations ⓘ ☑ Hide Closed Programs

Department	Title	Program Type	Status	Total Funding	Actions
Economic Development	Economic Development FY2024 - ED03	N/A	Ready to Publish	\$1,000,000.00	Actions

Showing 1 to 1 of 1 entries (filtered from 14 total entries)

[View detail](#)
[Edit Solicitation](#)
[Preview Application](#)
[Publish Solicitation](#)

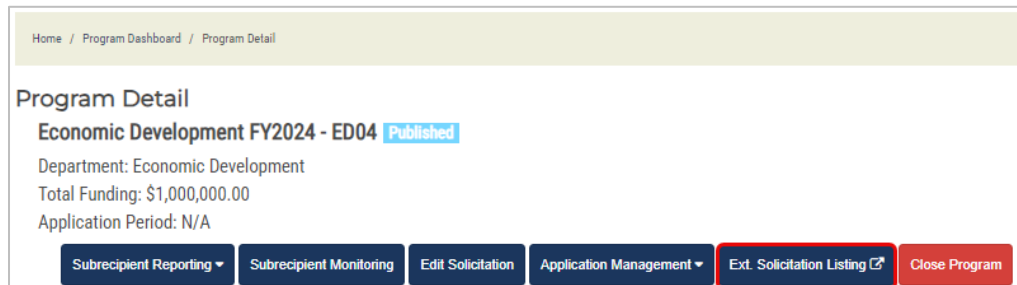
Previous

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.



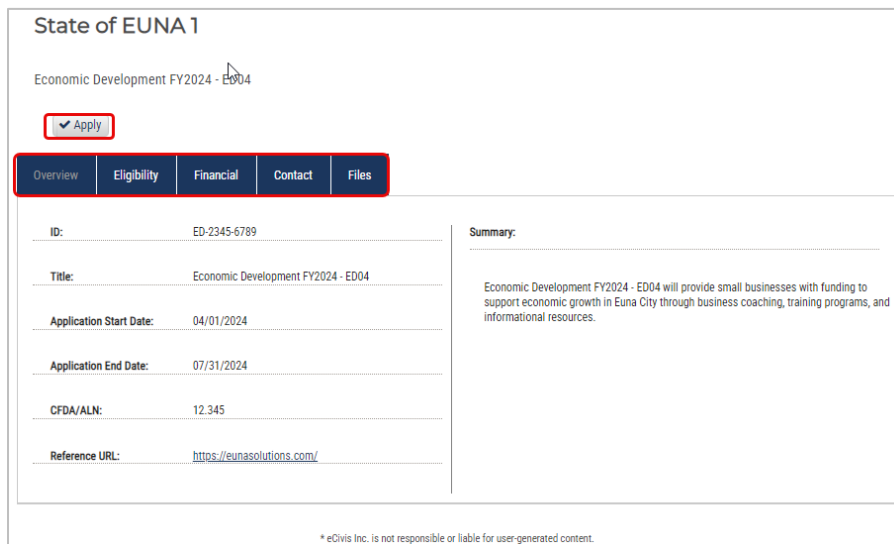
Home / Program Dashboard / Program Detail

Program Detail

Economic Development FY2024 - ED04 Published

Department: Economic Development
Total Funding: \$1,000,000.00
Application Period: N/A

Subrecipient Reporting ▾ Subrecipient Monitoring Edit Solicitation Application Management ▾ **Ext. Solicitation Listing ↗** Close Program



State of EUNA 1

Economic Development FY2024 - ED04

☒ Apply

Overview Eligibility Financial Contact Files

ID:	ED-2345-6789
Title:	Economic Development FY2024 - ED04
Application Start Date:	04/01/2024
Application End Date:	07/31/2024
CFDA/ALN:	12.345
Reference URL:	https://eunasolutions.com/

Summary:

Economic Development FY2024 - ED04 will provide small businesses with funding to support economic growth in Euna City through business coaching, training programs, and informational resources.

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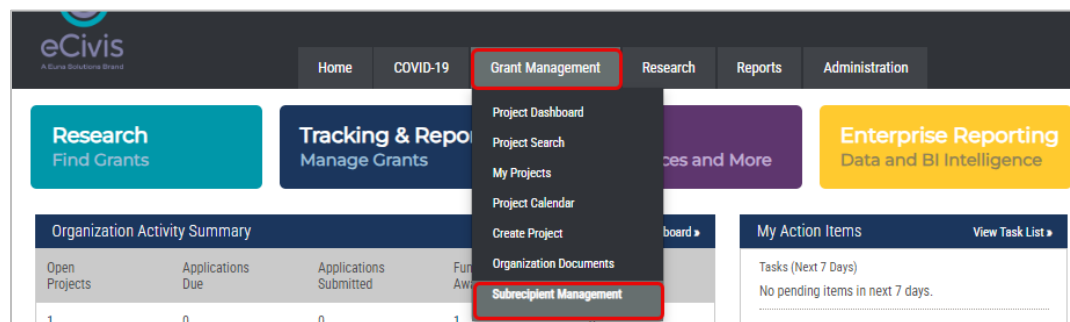
2. If corrections are needed, go back to the Solicitation Edit page and make any necessary updates. This will ensure the correct information will be viewed by Applicants for the 5 public-facing tabs as seen on the Public Solicitation page.

The Public Solicitations Listing Page

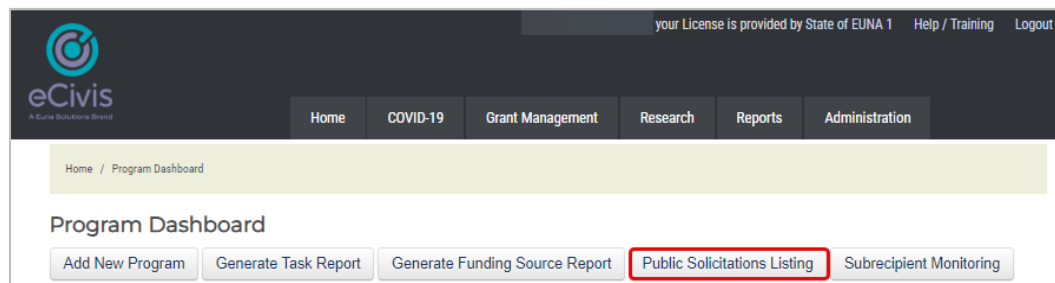
The Public Solicitations Listing Page is a shareable page that lists your programs currently open across all departments or within a specific department. This list is generated from Grants Network and can be shared via URL or embedded into your organization's website using an iframe code. Any programs 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

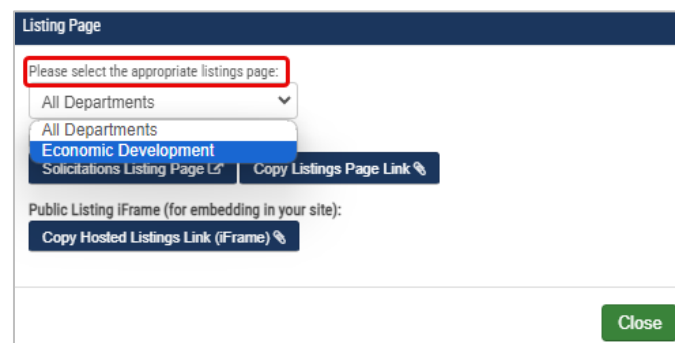
1. Starting on the Grants Management Tab scroll down and click on **Subrecipient Management**.



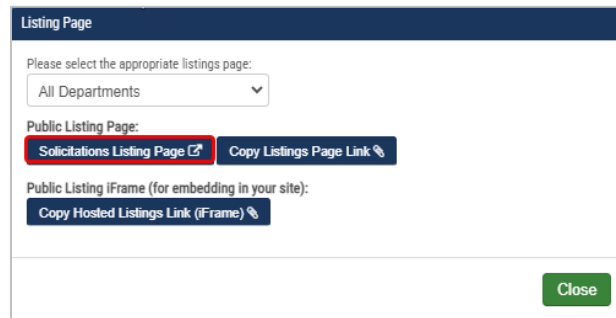
2. On the Program Dashboard click on the **Public Solicitations Listings** button.



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

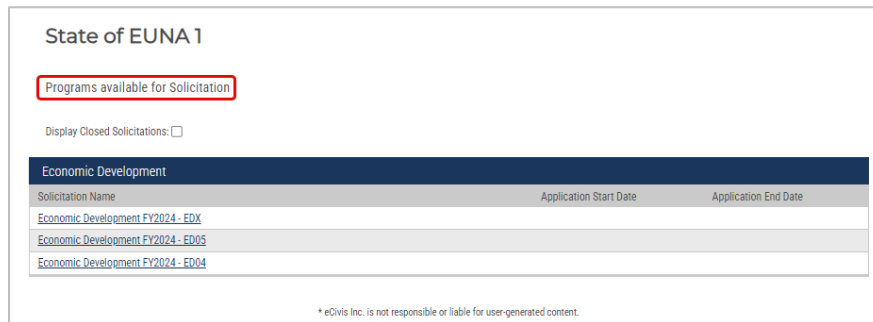


4. Scrolling down you will see the Public Listings Page, click the button to see the Solicitations Listing Page.



A modal window titled "Listing Page" with a dark blue header. Inside, it says "Please select the appropriate listings page:" followed by a dropdown menu currently set to "All Departments". Below this, under "Public Listing Page:", there are two buttons: "Solicitations Listing Page" (highlighted with a red box) and "Copy Listings Page Link". Under "Public Listing iFrame (for embedding in your site):", there is a button "Copy Hosted Listings Link (iFrame)". A green "Close" button is at the bottom right.

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

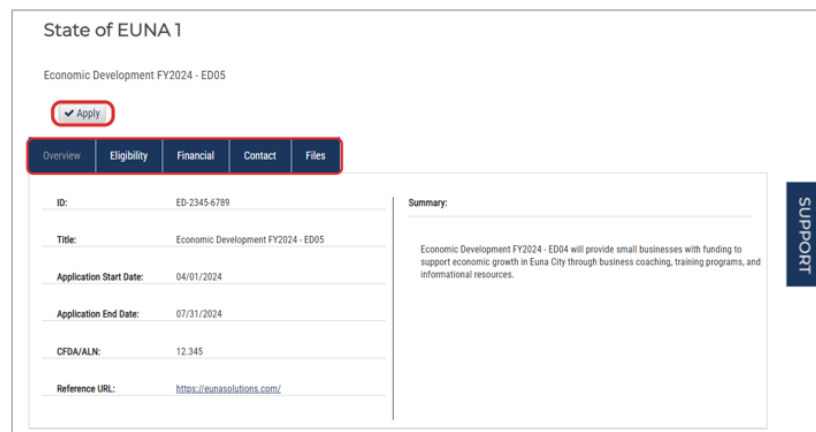


A screenshot of the "State of EUNA 1" page. A red box highlights the link "Programs available for Solicitation". Below it is a checkbox for "Display Closed Solicitations:". A table titled "Economic Development" lists three solicitations:

Solicitation Name	Application Start Date	Application End Date
Economic Development FY2024 - EDX		
Economic Development FY2024 - ED05		
Economic Development FY2024 - ED04		

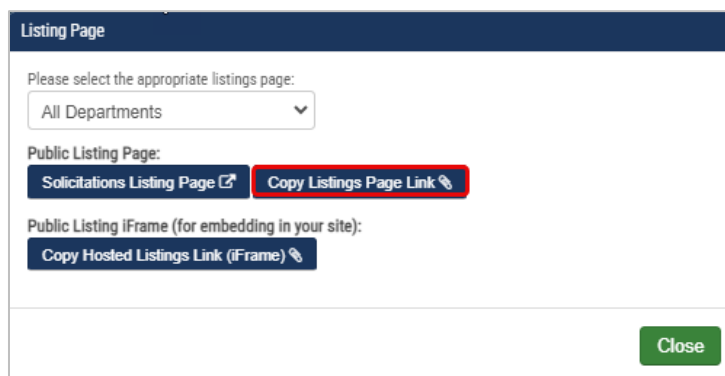
At the bottom, a small disclaimer reads: "* eCivis Inc. is not responsible or liable for user-generated content."

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).



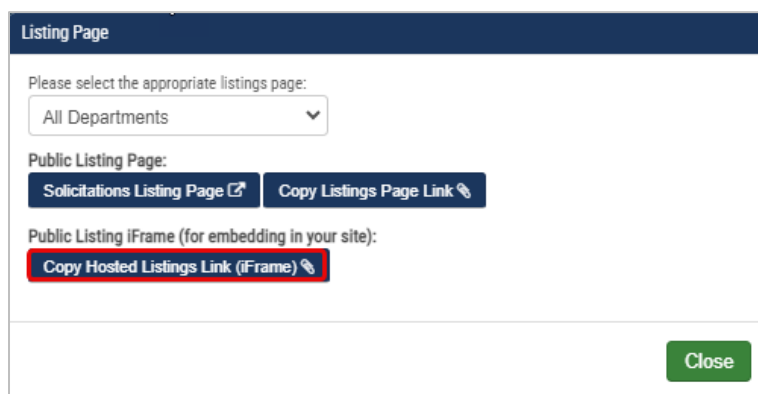
A screenshot of the "State of EUNA 1" public solicitation page for "Economic Development FY2024 - ED05". A red box highlights the "Apply" button. Below it are five tabs: "Overview", "Eligibility", "Financial", "Contact", and "Files". The "Overview" tab is active, showing details for ID: ED-2345-6789, Title: Economic Development FY2024 - ED05, Application Start Date: 04/01/2024, Application End Date: 07/31/2024, CFDA/ALN: 12.345, and Reference URL: <https://eunagovolutions.com/>. A "Summary" section on the right describes the funding purpose. A vertical "SUPPORT" button is on the far right.

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.



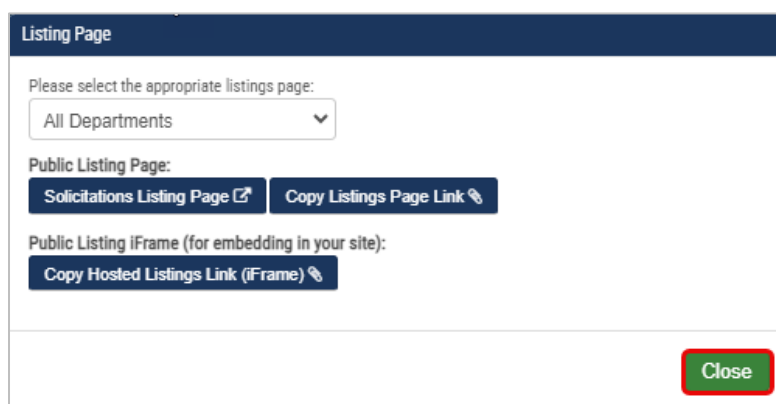
The screenshot shows a modal window titled "Listing Page". It contains a dropdown menu labeled "Please select the appropriate listings page:" with "All Departments" selected. Below this, under the heading "Public Listing Page:", there are two buttons: "Solicitations Listing Page" with an external link icon, and "Copy Listings Page Link" with a copy icon. The "Copy Listings Page Link" button is highlighted with a red rectangular box. Under the heading "Public Listing iFrame (for embedding in your site):", there is a button labeled "Copy Hosted Listings Link (iFrame)" with a copy icon. At the bottom right of the modal is a green "Close" button.

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



This screenshot is identical to the previous one, showing the "Listing Page" modal. In this view, the "Copy Hosted Listings Link (iFrame)" button under the "Public Listing iFrame" section is highlighted with a red rectangular box. The "Copy Listings Page Link" button is no longer highlighted.

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



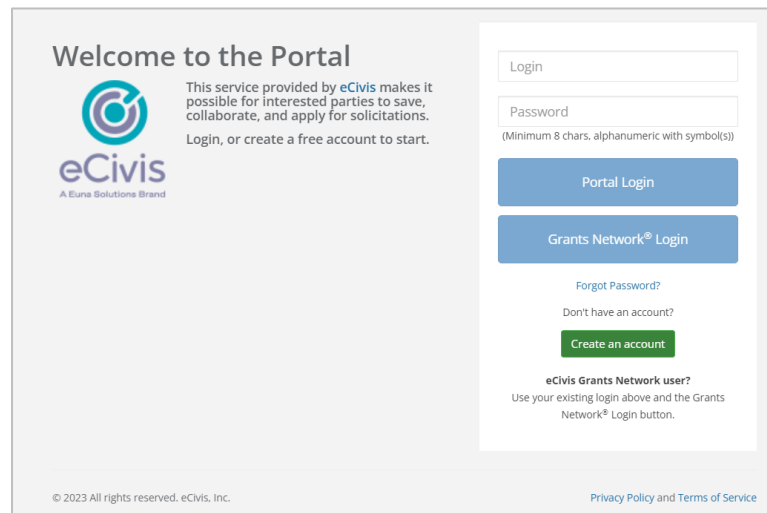
This screenshot shows the "Listing Page" modal with the same elements as the previous ones. In this view, the green "Close" button at the bottom right is highlighted with a red rectangular box.

Applicant Experience in eCivis Portal

1. Applicants will need an eCivis Portal account to manage their applications and awards.

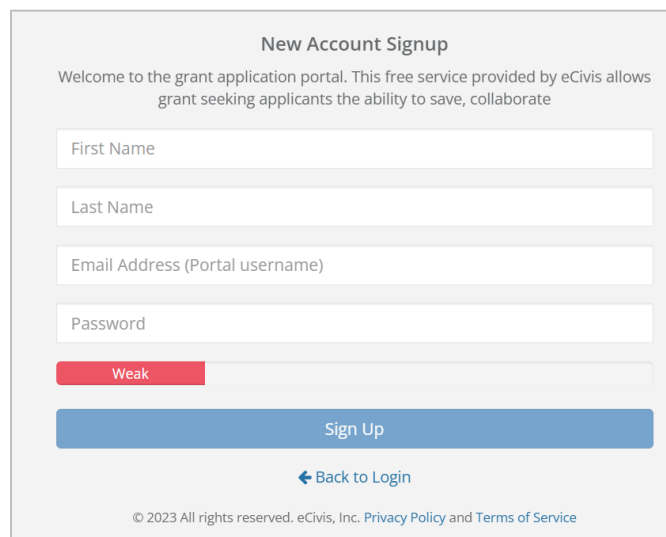
<https://portal.ecivis.com/#/login>

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



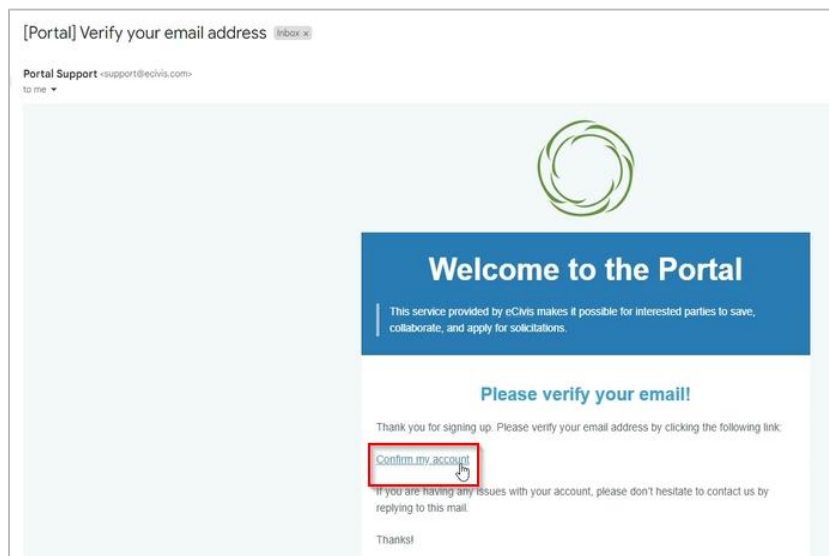
The screenshot shows the 'Welcome to the Portal' page. On the left, there is the eCivis logo (a stylized 'e' in a circle) and the text 'eCivis A Euna Solutions Brand'. To the right of the logo, it says 'This service provided by eCivis makes it possible for interested parties to save, collaborate, and apply for solicitations. Login, or create a free account to start.' On the right side of the page, there is a login form with two input fields: 'Login' and 'Password'. Below the password field, it says '(Minimum 8 chars, alphanumeric with symbol(s))'. There are two blue buttons: 'Portal Login' and 'Grants Network® Login'. Below these buttons, there are links for 'Forgot Password?' and 'Don't have an account?'. A green button labeled 'Create an account' is also present. At the bottom, there is a section for 'eCivis Grants Network user?' with the instruction 'Use your existing login above and the Grants Network® Login button.' The footer contains '© 2023 All rights reserved. eCivis, Inc.' and a link to 'Privacy Policy and Terms of Service'.

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.



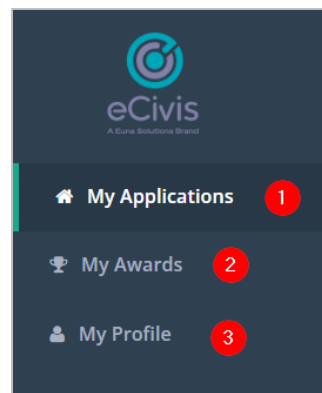
The screenshot shows the 'New Account Signup' page. At the top, it says 'New Account Signup'. Below that, it says 'Welcome to the grant application portal. This free service provided by eCivis allows grant seeking applicants the ability to save, collaborate'. There are four input fields: 'First Name', 'Last Name', 'Email Address (Portal username)', and 'Password'. Below the password field, there is a red bar with the word 'Weak' in white. A blue button labeled 'Sign Up' is at the bottom. Below the button, there is a link '← Back to Login'. The footer contains '© 2023 All rights reserved. eCivis, Inc. Privacy Policy and Terms of Service'.

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

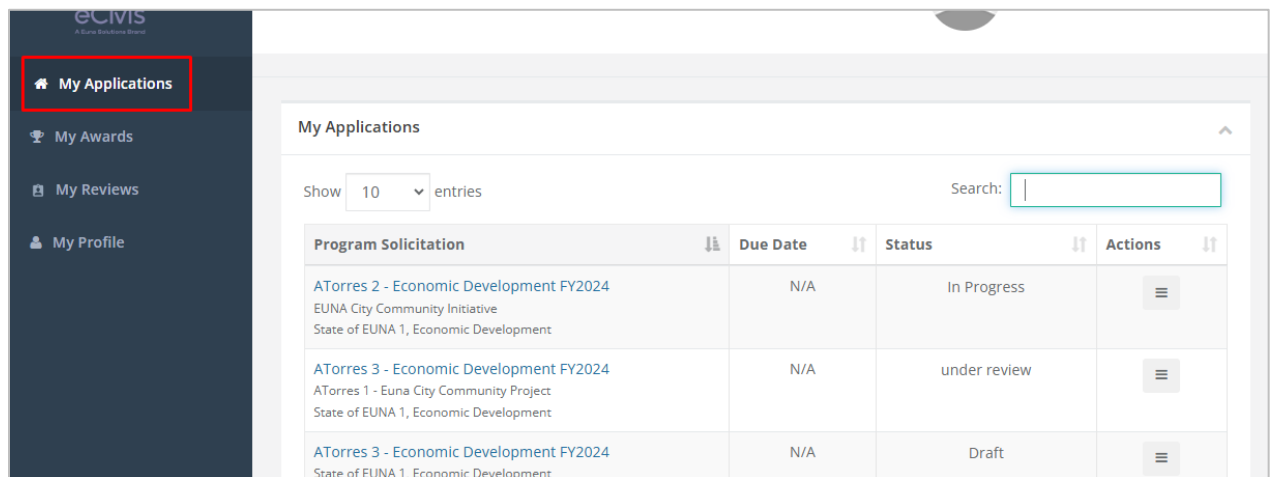


Navigation

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



- 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.



- 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.

My Profile

Applicant Information

First Name* Anthony

Last Name* Torres

Email euna.subrecipient@gmail.com

Title

Company

Company Website

Organization Information

Organization Name

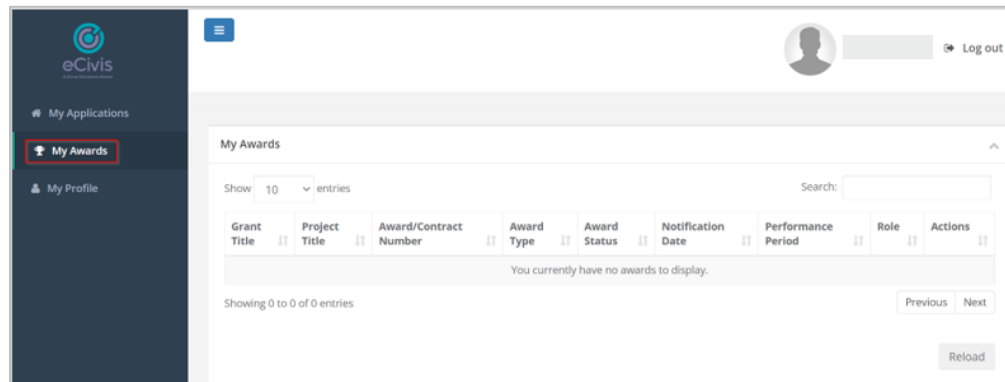
Employer Identification Number (EIN)

DUNS

URL

Authorized Representative

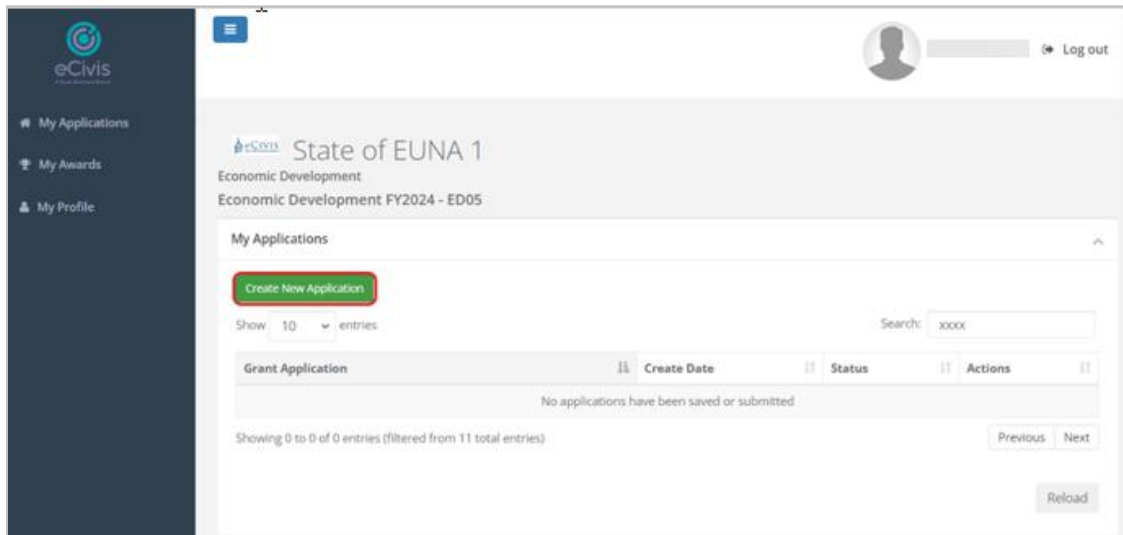
4. On the **My Awards** page you will see information here for any Awards that have been awarded. At this time there are no awards listed as the process is to begin for an applicant to apply for a Program Solicitation.



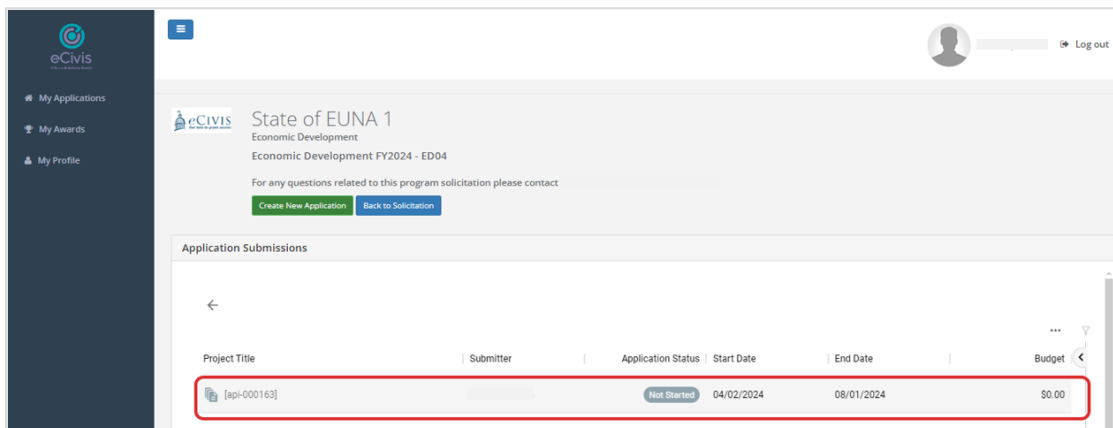
Submit an Application

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

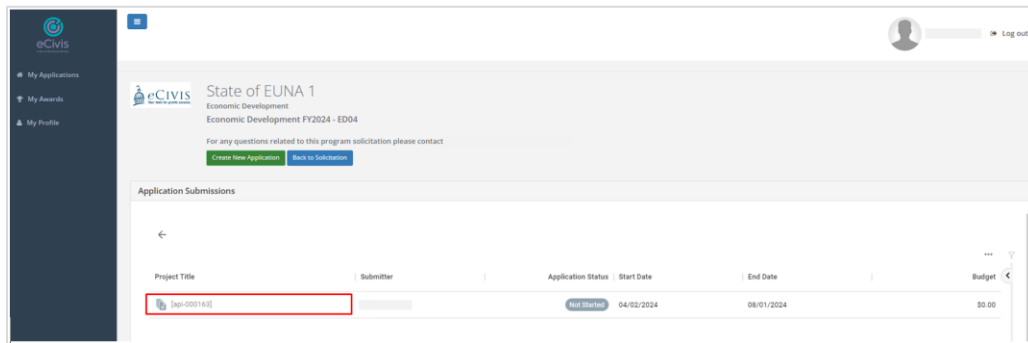
2. Click Create New Application



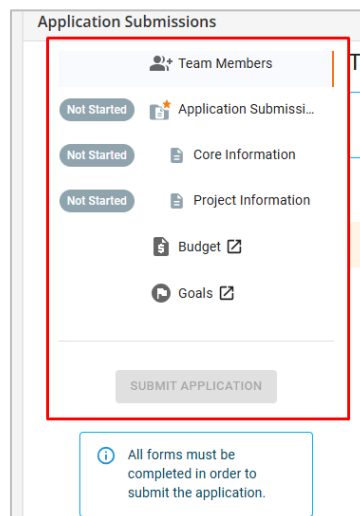
3. The new application will appear on the Application Submissions table.
***Note:** If the Program allows multiple application submissions from the same applicant, this table will list any other application submissions they create toward this Program.



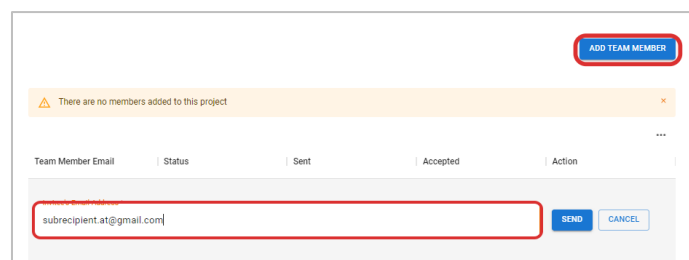
4. Click on the newly added Project Title (labeled with a unique code beginning with “api-“)



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

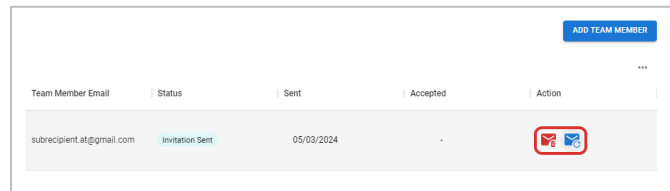




- a. **Team Members:** Add Team members to collaborate on this application.
 - i. Click **Add Team Member**
 - ii. Enter the invitee’s Email Address and click **Send**



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

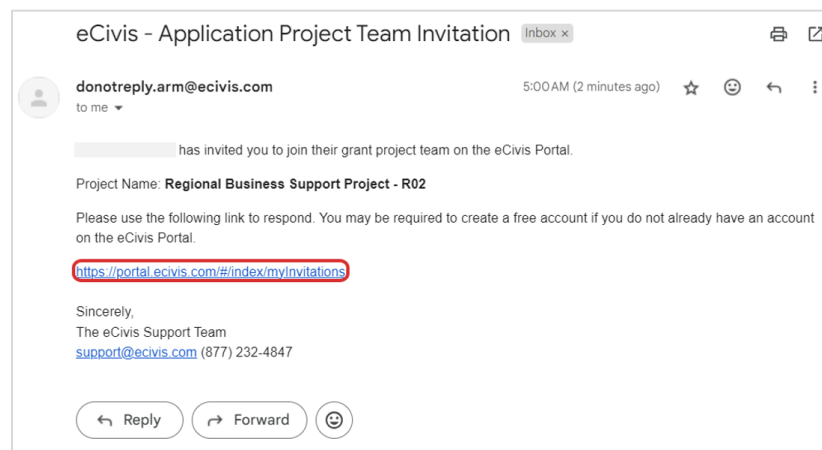
***Note:** If the invitation needs to be deleted, you can click on the red envelope icon and if it needs to be resent you can click on the blue invitation icon.



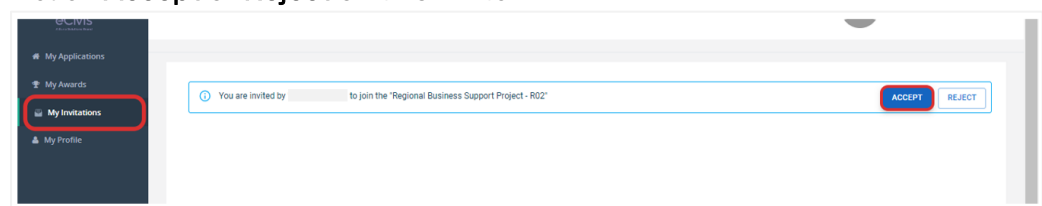
Team Member Email	Status	Sent	Accepted	Action
subrecipient.at@gmail.com	Invitation Sent	05/03/2024	-	 


- iv. The invitee will receive an email to access eCivis Portal and accept the invitation.

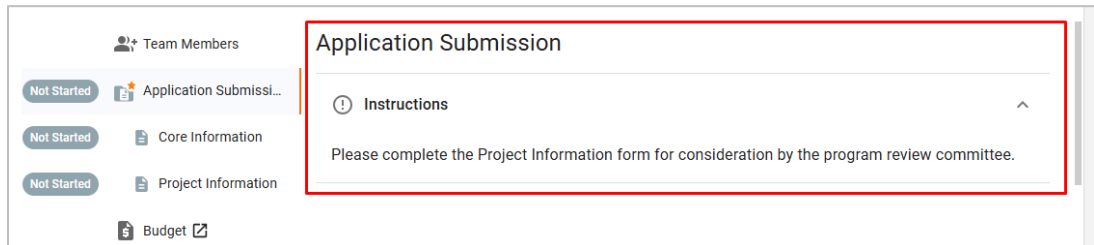
***Note:** The invitee must set up a Portal account if they have not already done so.



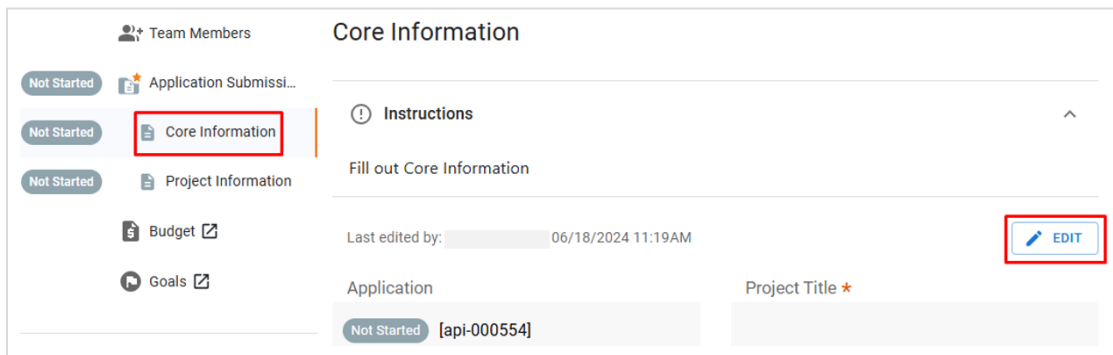
- v. In Portal, they will click **My Invitations** from the navigation bar and click **Accept** or **Reject** on this invite.



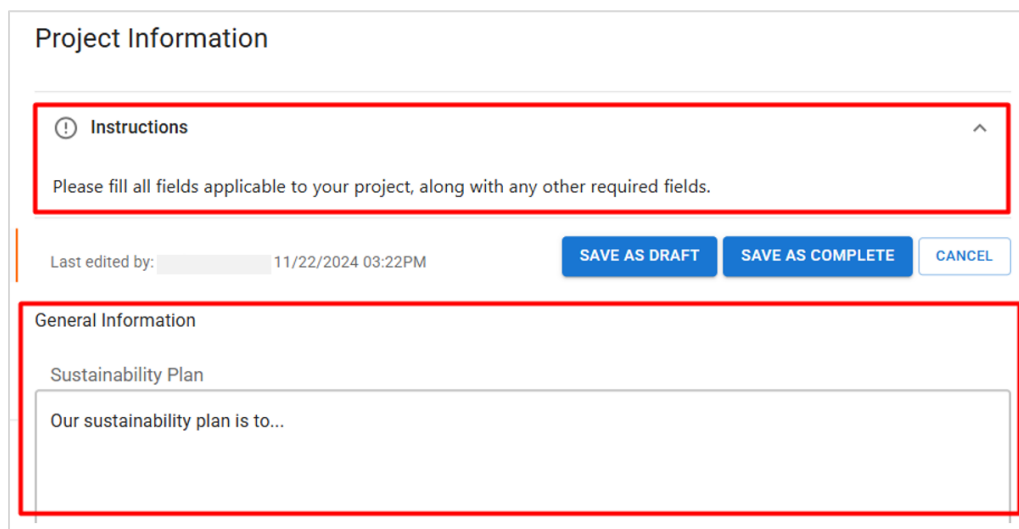
- b. **Submission Stage:** The starred folder icon  indicates the current Submission Stage to be completed
- i. Open this section to view the title and instructions for this Submission Stage



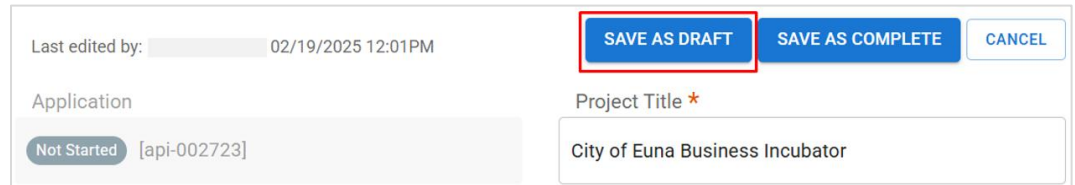
- c. **Application Forms:** Open and edit each form until complete
- i. Select the form from the left-hand panel and click **Edit**



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

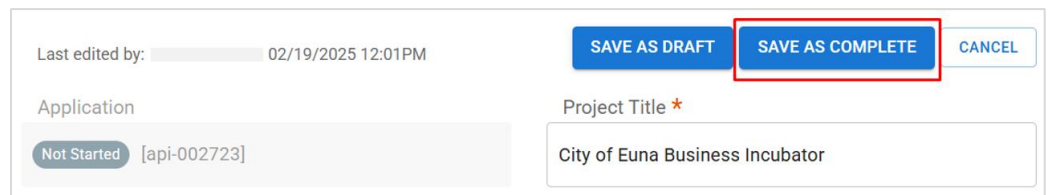


- iii. Click the **Save Draft** button to save all form details (either to return to it later or in preparation to mark the form complete)



Form header section showing the 'Last edited by' field (02/19/2025 12:01PM), the 'Application' status (Not Started [api-002723]), and the 'Project Title' (City of Euna Business Incubator). The 'SAVE AS DRAFT' button is highlighted with a red box.

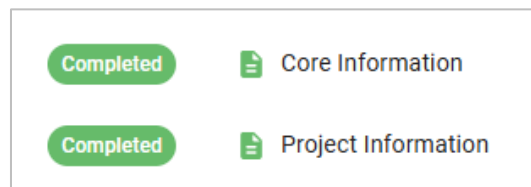
- iv. When all required fields are complete and all edits are finalized, click **Save As Complete**.



Form header section showing the 'Last edited by' field (02/19/2025 12:01PM), the 'Application' status (Not Started [api-002723]), and the 'Project Title' (City of Euna Business Incubator). The 'SAVE AS COMPLETE' button is highlighted with a red box.

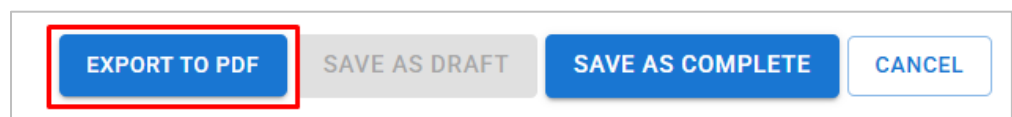
- v. Any forms you save as complete will update to the green **Completed** status

***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.



Form sections showing the 'Completed' status for both 'Core Information' and 'Project Information' sections.

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



Form header section showing the 'EXPORT TO PDF' button highlighted with a red box, along with 'SAVE AS DRAFT', 'SAVE AS COMPLETE', and 'CANCEL' buttons.

- 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]

The screenshot shows two parts of the application interface. On the left is a vertical sidebar with a list of items: 'Team Members', 'Application Submissi...' (Not Started), 'Core Information' (Not Started), 'Project Information' (Not Started), 'Budget' (highlighted with a red box), and 'Goals'. On the right is the 'Budget Worksheet' for the 'Pre-Award' stage. It features an 'Actions' bar with icons for saving, deleting, and adding. Below this is a 'Budget Summary' table with three rows: 'Total Direct Costs' (\$0.00), 'Total Indirect Costs' (\$0.00), and 'Total Amount (Direct + Indirect)' (\$0.00). To the right of these values are labels: 'Match / Cost Share', 'Program Income', and a blank space. At the bottom is a 'Budget Settings' section.

- 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.

The screenshot shows the left-hand sidebar of the application. The items are: 'Team Members', 'Application Submissi...' (In Progress), 'Core Information' (Draft), 'Project Information' (Completed), 'Budget', and 'Goals' (highlighted with a red box). At the bottom of the sidebar is a 'SUBMIT APPLICATION' button.

- 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.

Application Goals for City of EUNA
Program: Economic Development FY2024 - ED
Project name: Regional Business Support Project

Goal / Objective	Target Units	Direct Cost Expenditure	Matching Expenditure	Program Income Expenditure
Provide SBDC Training	0.00	\$ 0.00	\$ 0.00	\$ 0.00
Subgoals				
SBDC Training Session #1	0.00	\$ 0.00	\$ 0.00	\$ 0.00
SBDC Training Session #2	0.00	\$ 0.00	\$ 0.00	\$ 0.00

[Return to Application](#) [Save Goals](#)

- 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.

Community Project ABCD Application [api-000554]

Team Members

In Progress Application Submissi...

Completed Core Information

Completed Project Information

Budget

Goals

Application Submission

Instructions

Please complete the Project Infor

SUBMIT APPLICATION

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

Community Project ABCD App

Team Members

Submitted Application Submissi...

Completed Core Information

Completed Project Information

Budget

Goals

SUBMIT APPLICATION

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

Community Project ABC Appli

Team Members

Submitted Intent to Apply

Completed Intent to Apply Form

Submitted Project Submission

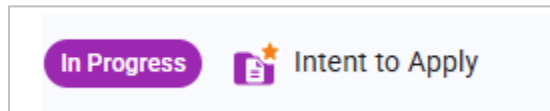
Completed Project Information

Budget

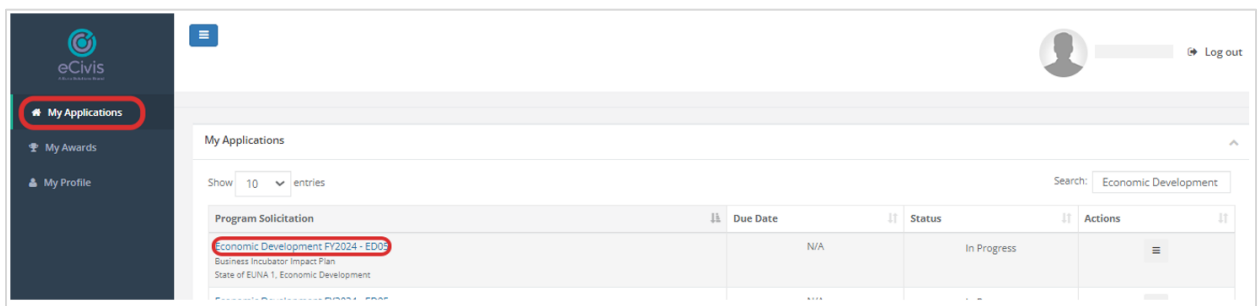
Goals

SUBMIT APPLICATION

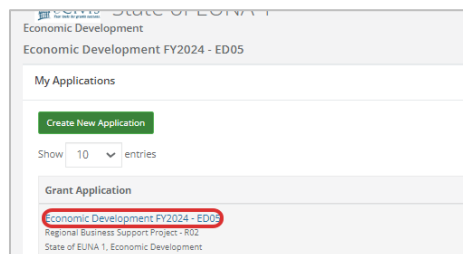
If you are caught up, you should see NO stages with a yellow star over the folder icon and with a status of **In Progress**.



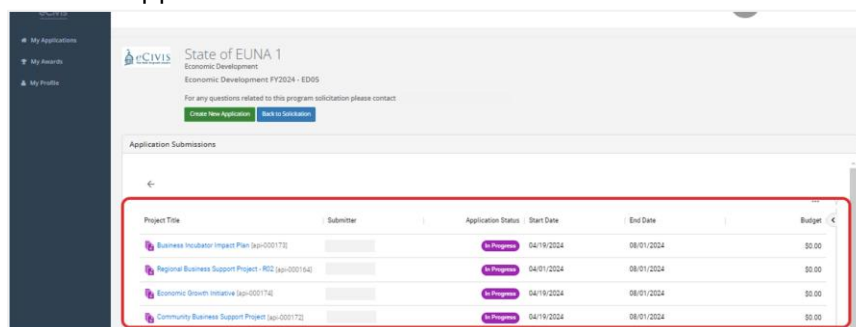
8. The Grantor will then assign Review Committee members to access and review select portions of the application content.
9. Applicants can access current or prior applications by clicking **My Applications** from the left-hand navigation bar. They can search or sort the headings of this table to find 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.

Program	Status	Start	End	App Setup	Department	Total Funding	Program Type
Economic Development FY2024 - ED01 [p-3676]	Draft	03/01/20...	01/01/20...	✓	Economic...	\$0.00	-
[p-4300]	Draft	04/01/20...	01/01/20...	⚠	Economic...	\$1,000,00...	-
[p-4299]	Published	04/01/20...	01/01/20...	✓	Economic...	\$1,000,00...	-
[p-4302]	Draft	04/01/20...	01/01/20...	⚠	Economic...	\$1,000,00...	-
[p-4306]	Finalized	04/01/20...	12/31/20...	✓	Economic...	\$1,000,00...	-
[p-4307]	Published	04/01/20...	01/01/20...	✓	Economic...	\$1,000,00...	-

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

Program	Status	Start	End	App Setup	Department	Total Funding	Program Type
Economic Development FY2024 - ED01 [p-3676]	Draft	03/01/20...	01/01/20...	✓	Economic...	\$0.00	-
[p-4300]	Draft	04/01/20...	01/01/20...	⚠	Economic...	\$1,000,00...	-
[p-4299]	Published	04/01/20...	01/01/20...	✓	Economic...	\$1,000,00...	-
[p-4302]	Draft	04/01/20...	01/01/20...	⚠	Economic...	\$1,000,00...	-
[p-4306]	Finalized	04/01/20...	12/31/20...	✓	Economic...	\$1,000,00...	-
[p-4307]	Published	04/01/20...	01/01/20...	✓	Economic...	\$1,000,00...	-

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

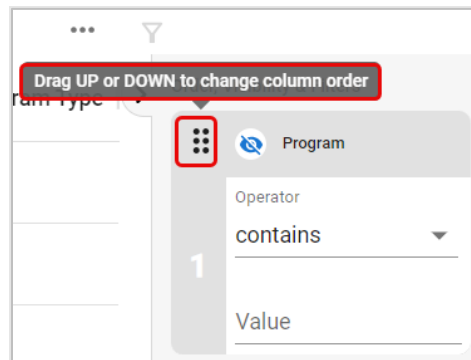
Program	Status	Start	End	App Setup	Department	Total Funding	Program Type
Small Business Support ARM FY2023 [p-3647]	Draft	-	-		Adminis...	\$0.00	-
Economic Development FY2024 - ED01 [p-3676]	Draft	03/01/2...	01/01/2...		Economi...	\$0.00	-

Filter Icon

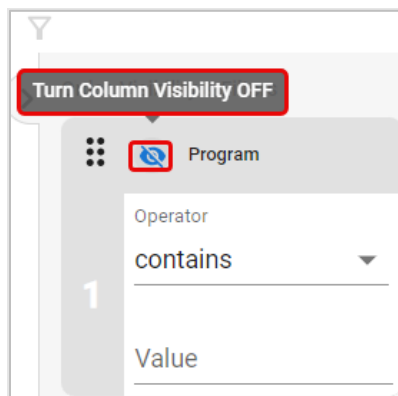
Users can utilize the Filter Icon for **Order, Visibility, & Filters**. A scroll bar is also available on the side of filters area so a user can scroll down to view additional column settings.

Use the below commands to modify the view of table data

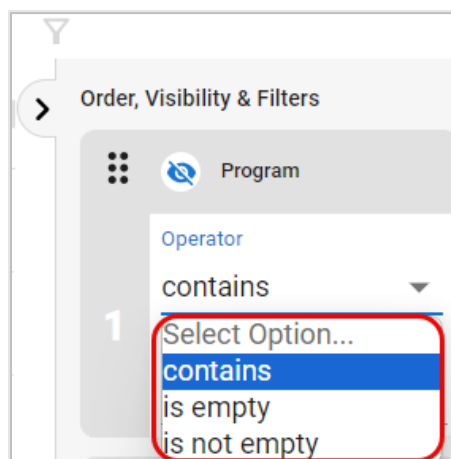
1. Order – allows user to drag up or down to change column header order.



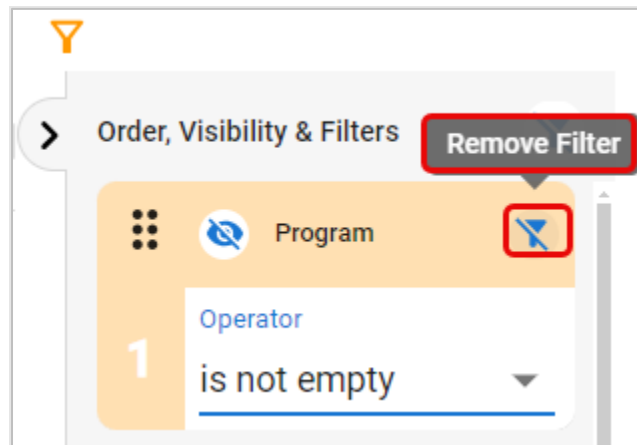
2. Visibility – allows user to turn off column visibility



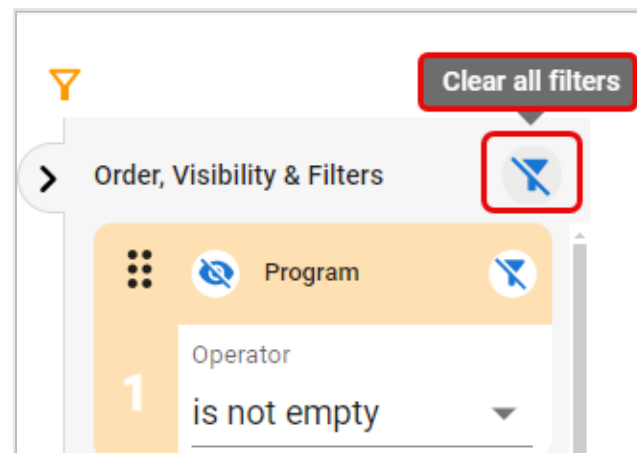
3. Filter
 - a. Allows user to select an option to filter data.



- 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.

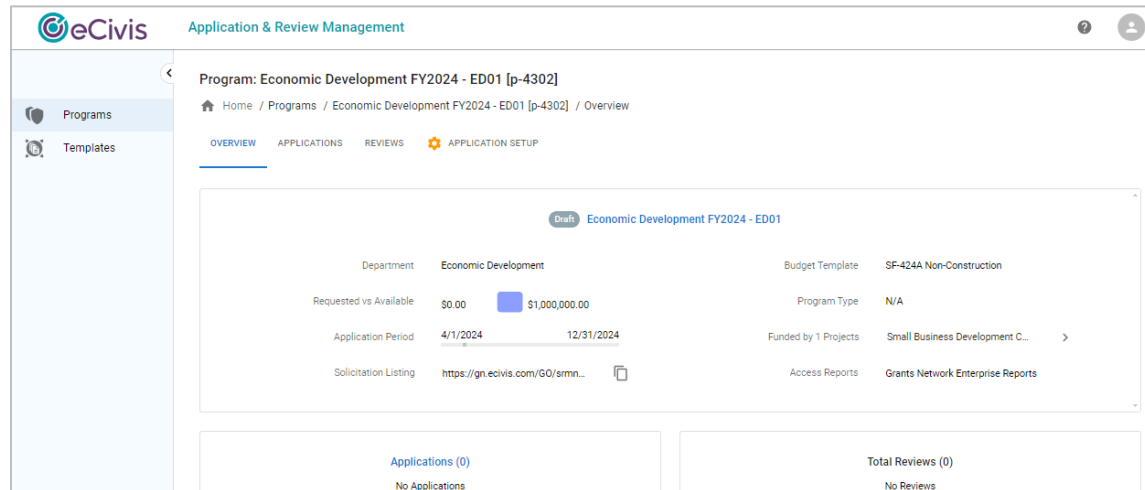


- c. To clear all filters, click on **Clear all filters** and default will be displayed.



Program

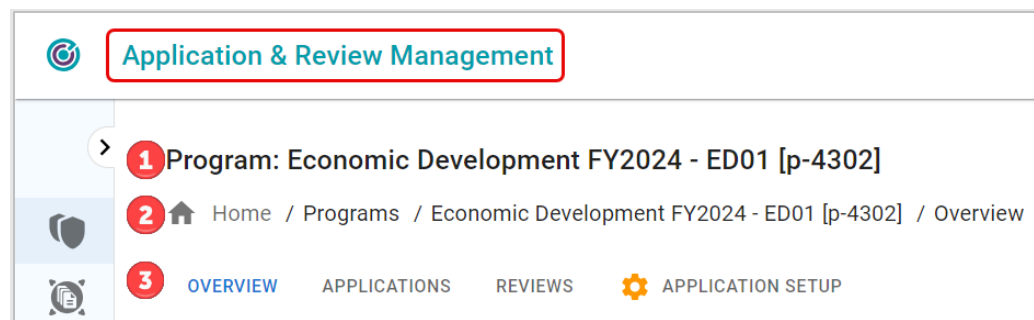
While a Program is running, use the top headings of the Program page to view and manage its applications and reviews.



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:

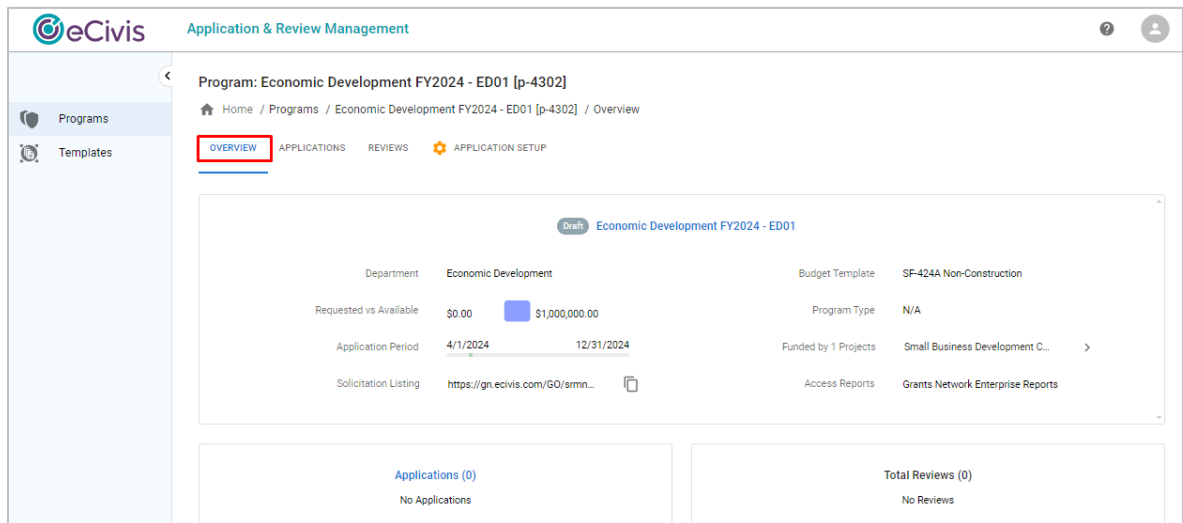
 1. Help Desk Icon
 - a. eCivis Help Center

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.

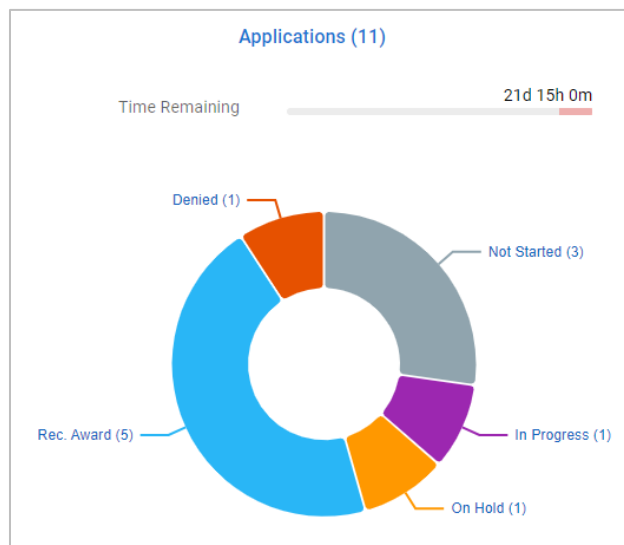


3. Status of Program – the following are the different statuses that may be displayed next to the Program Name.

- 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

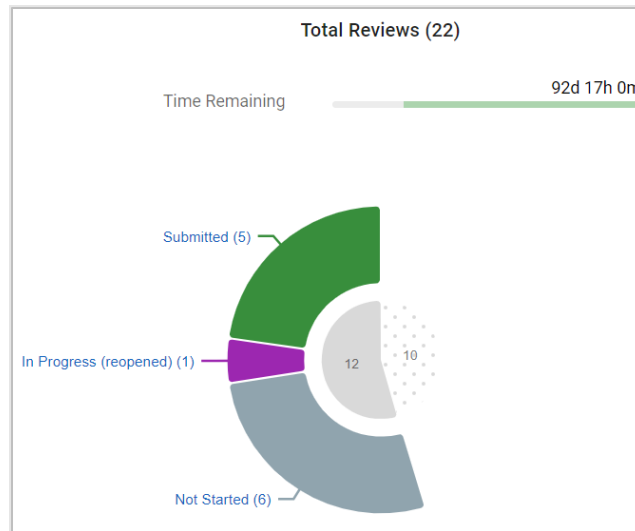
4. Applications Chart

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.

Application & Review Management							
Program: Economic Development FY2024 - ED [p-3776]							
Home / Programs / Economic Development FY2024 - ED [p-3776] / Applications							
OVERVIEW APPLICATIONS REVIEWS APPLICATION SETUP							
Project Title	Submitter	Application Status	Start Date	End Date	Budget	Actions +	
Business Incubator Impact Plan [api-000157]		Decision Denied			\$0.00	REVERT	
[api-000160]		Not Started	11/01/2023	06/01/2024	\$0.00		
[api-000161]		Not Started	11/01/2023	06/01/2024	\$0.00		
Grants Station Area Economic Plan [api-000156]		Decision Rec. Award			\$0.00		
Community Economic Development Sup... [api-000159]		In Progress	11/01/2023	10/01/2024	\$0.00		
Economic Growth Initiative [api-000158]		Decision On Hold			\$0.00	REVERT RECOMMEND	

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.

<input type="checkbox"/>	Name	Total Assigned	Not Started	In Progress	Submitted (since inception)
<input type="checkbox"/>	John Doe	10	10	10	10
<input type="checkbox"/>	Jane Doe	12	12	12	12

Application Setup

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

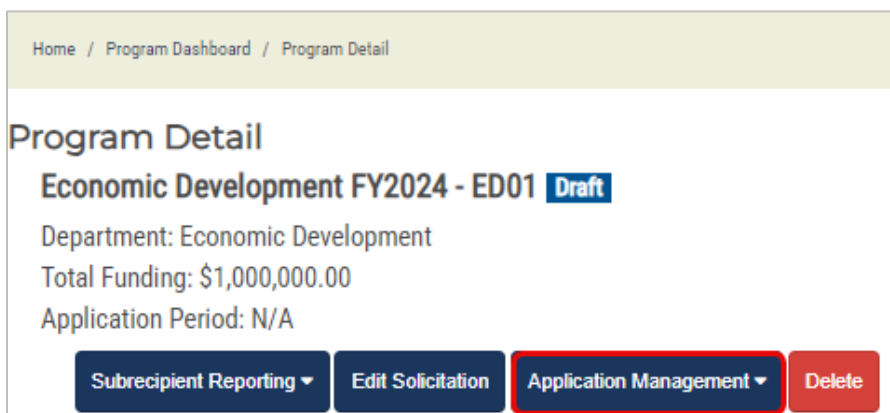
Entity	Type	BL	Instructions	Start	End	Usage & Actions
1	Economic Development F... [apm-000205]	APPLICATION PROCESS	--	04/01/2024	01/01/2025	ADD STAGE
1	Intent to Apply [asm-000405]	Submission Stage	--	04/01/2024	08/01/2024	ADD FORM
	Intent to Apply F... [afm-000738]	Application Form	--	--	--	
	Eligibility Check [esm-000406]	Evaluation Stage	--	04/19/2024	08/01/2024	ADD FORM
	Eligibility Review ... [rfm-000739]	Review Form	--	--	--	
2	Project Submission [asm-000407]	Submission Stage	--	04/19/2024	08/01/2024	ADD FORM
	Project Informati... [afm-000740]	Application Form	--	--	--	
	Review Period [esm-000408]	Evaluation Stage	--	04/19/2024	01/01/2025	ADD FORM
	Project Informati... [rfm-000741]	Review Form	--	--	--	

Managing Application Submissions

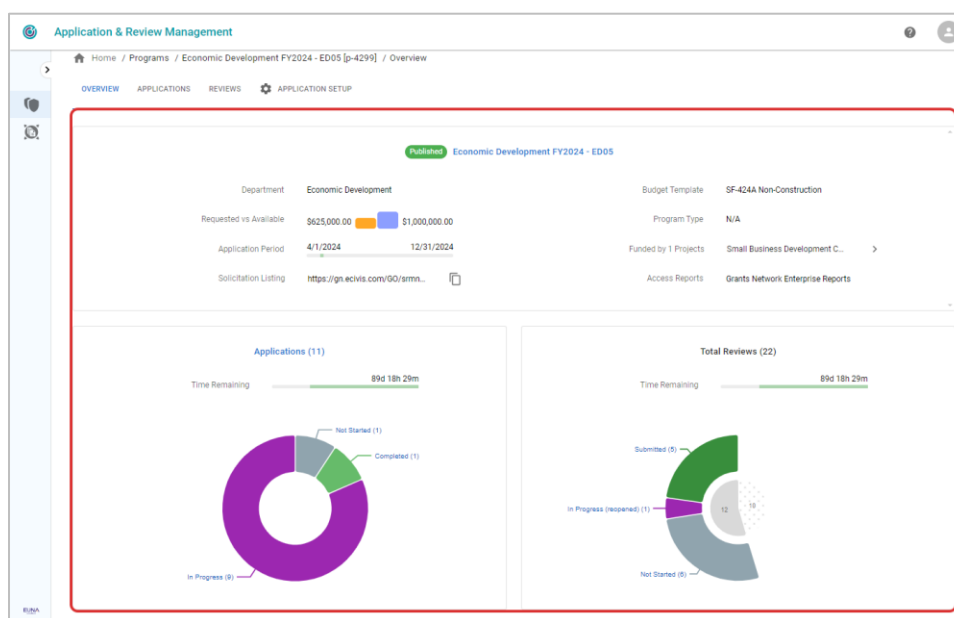
Grant Management Tab > Subrecipient Management > Program Dashboard > Program Solicitation > Program Detail Page > Application Management

Monitoring Applications

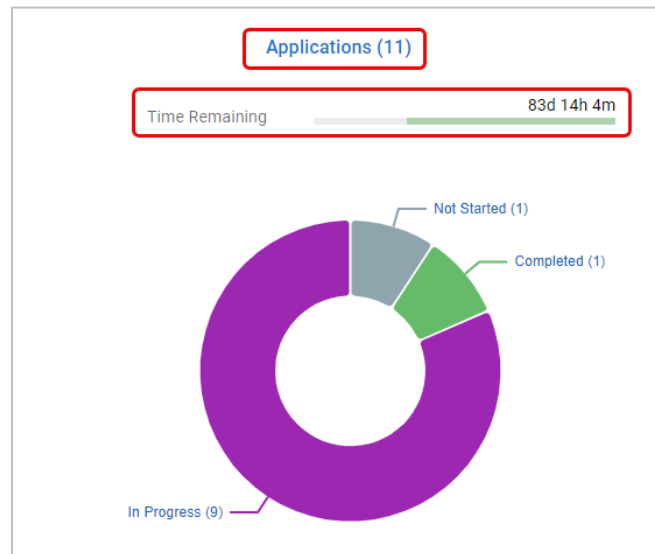
1. The Grantor will log into Grants Network and continue the process by accessing the Application and Review Manager button on the Program Detail Page.



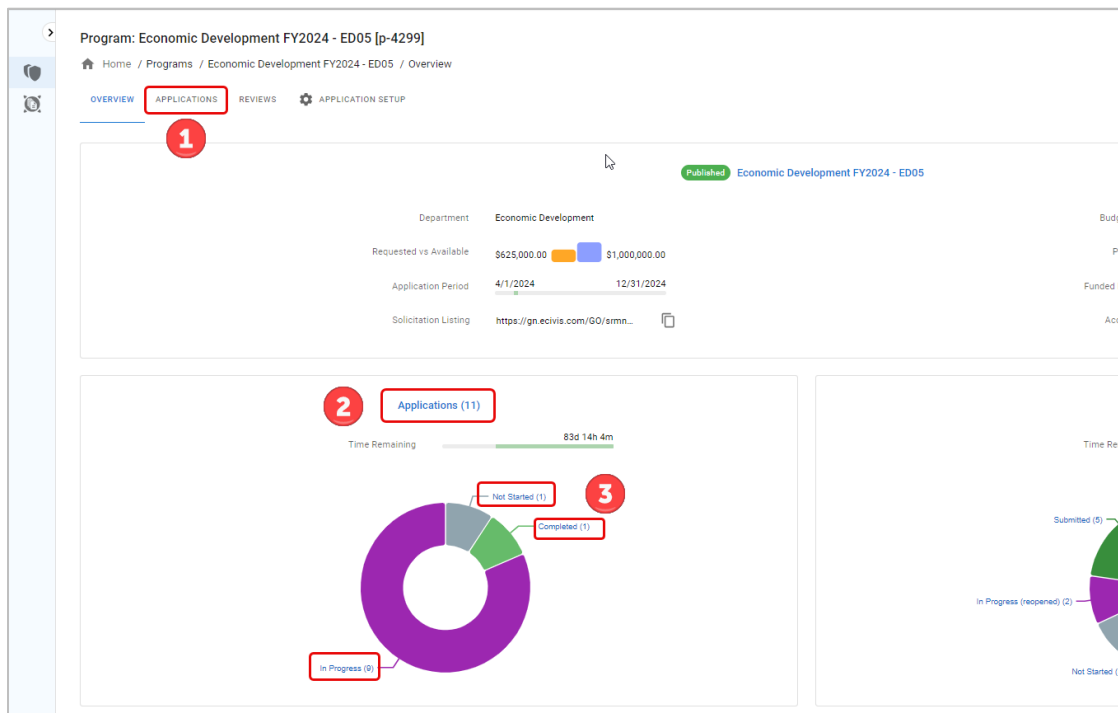
2. This will open to the Application & Review Manager Dashboard:



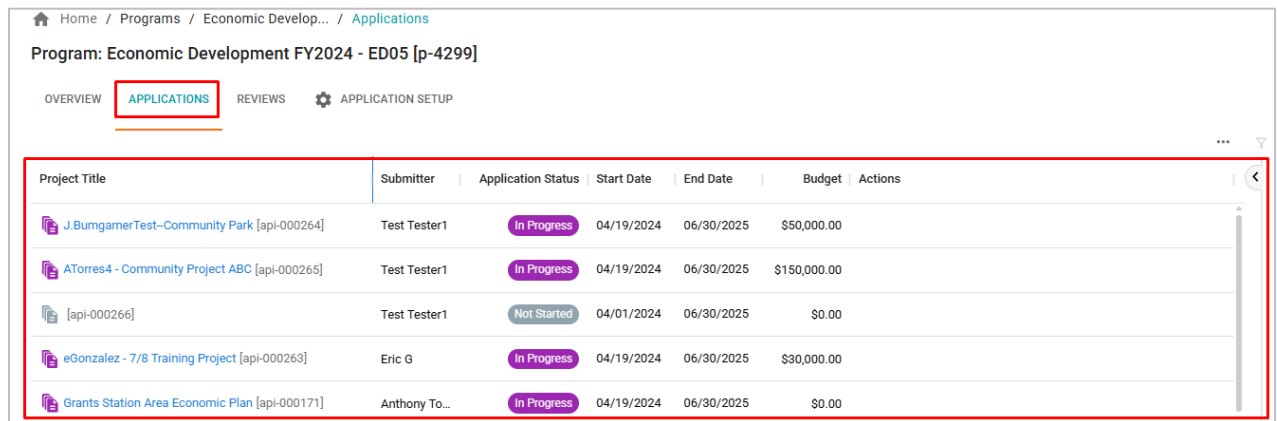
3. Use the donut charts, as shown here, to monitor the statuses of all applications and Time Remaining in the Application Process:



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

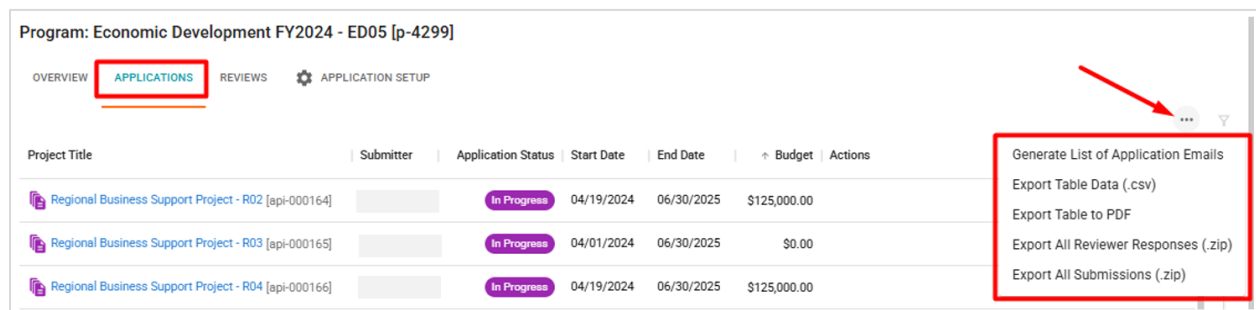


Project Title	Submitter	Application Status	Start Date	End Date	Budget	Actions
J.BurngarnerTest-Community Park [api-000264]	Test Tester1	In Progress	04/19/2024	06/30/2025	\$50,000.00	
ATorres4 - Community Project ABC [api-000265]	Test Tester1	In Progress	04/19/2024	06/30/2025	\$150,000.00	
[api-000266]	Test Tester1	Not Started	04/01/2024	06/30/2025	\$0.00	
eGonzalez - 7/8 Training Project [api-000263]	Eric G	In Progress	04/19/2024	06/30/2025	\$30,000.00	
Grants Station Area Economic Plan [api-000171]	Anthony To...	In Progress	04/19/2024	06/30/2025	\$0.00	

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.

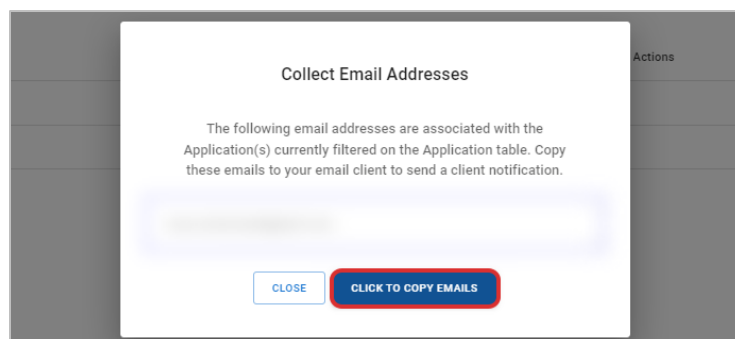


Project Title	Submitter	Application Status	Start Date	End Date	Budget	Actions
Regional Business Support Project - R02 [api-000164]		In Progress	04/19/2024	06/30/2025	\$125,000.00	
Regional Business Support Project - R03 [api-000165]		In Progress	04/01/2024	06/30/2025	\$0.00	
Regional Business Support Project - R04 [api-000166]		In Progress	04/19/2024	06/30/2025	\$125,000.00	

- Generate List of Application Emails
- Export Table Data (.csv)
- Export Table to PDF
- Export All Reviewer Responses (.zip)
- Export All Submissions (.zip)

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 M	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.





Name	Type
 Economic Development FY2024 - ED05-Eligibil...	Microsoft Excel Comma Separat
 Economic Development FY2024 - ED05-Projec...	Microsoft Excel Comma Separat

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

View Individual Application Submissions

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

OVERVIEW APPLICATIONS REVIEWS  APPLICATION SETUP

Project Title	Submitter ↑	Applicat
 Business Incubator Impact Plan [api-000173]		In
 Regional Business Support Project - R07 [api-000169]		Decision R
 Regional Business Support Project - R03 [api-000165]		In
 City of Euna Business Incubator [api-002723]		In

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

The screenshot shows the 'City of Euna Business Incubator Application [api-002723]' page. The left-hand navigation bar is highlighted with a red box, showing a list of stages: Application [api...], Intent to Apply, Intent to Apply..., Eligibility Check, Eligibility Revi..., Project Submissi..., Project Informat..., Review Period, and Project Informat... The main content area shows the 'Instructions' section and a table of entities. The table has columns for Entity, Type, Completion, Status, and Actions. The entities listed are: Application [api-002723] (Application Instance, 0% completion, In Progress status), Intent to Apply [api-006237] (Submission Stage, 0% completion, In Progress status), Intent to Apply Form [afi-012379] (Application Form, 100% completion, Draft status, with EDIT and COMPLETE buttons), Eligibility Check [esi-006238] (Evaluation Stage, 0% completion, Unassigned status), and Eligibility Review Form [rfm-000739] (Review Form(s), 0% completion, Unassigned status). The table rows for 'Intent to Apply' and 'Eligibility Check' are also highlighted with a red box.

Entity	Type	Completion	Status	Actions
Application [api-002723]	Application Instance	0%	In Progress	
Intent to Apply [api-006237]	Submission Stage	0%	In Progress	
Intent to Apply Form [afi-012379]	Application Form	100%	Draft	EDIT COMPLETE
Eligibility Check [esi-006238]	Evaluation Stage	0%	Unassigned	
Eligibility Review Form [rfm-000739]	Review Form(s)	0%	Unassigned	

Project Team

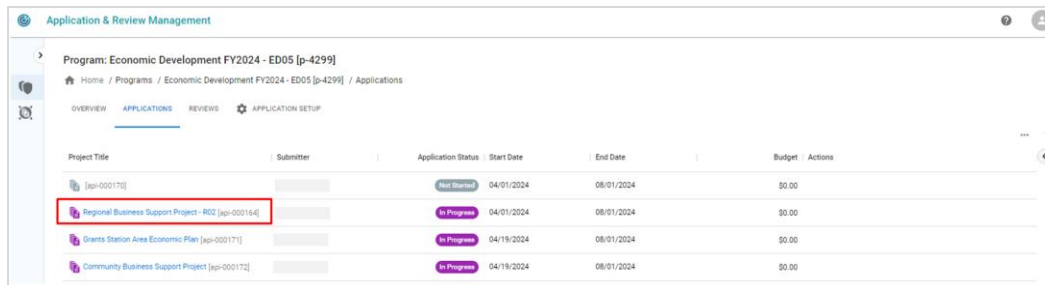
View and manage all Team Members that you or the Applicant have invited to the Application.

The screenshot shows the 'Euna City Business Incubator Project Application [api-000170]' page. The left-hand navigation bar is highlighted with a red box, showing a list of stages: Application [api...], Intent to Apply, Eligibility Check, Project Submissi..., Review Period, and Project Team. The 'Project Team' link is highlighted with a red box. The main content area shows the 'Team Member' section with an 'ADD TEAM MEMBER' button and a table of team members. The table has columns for Team Member Email, Status, Sent, Accepted, and Action. The team members listed are: euna.subrecipient+1@gmail.com (Invitation Accepted, 04/10/2025 sent, 04/10/2025 accepted, with a red person icon), and euna.subrecipient+2@gmail.com (Invitation Sent, 04/10/2025 sent, - accepted, with a red envelope icon and a blue envelope icon).

Team Member Email	Status	Sent	Accepted	Action
euna.subrecipient+1@gmail.com	Invitation Accepted	04/10/2025	04/10/2025	
euna.subrecipient+2@gmail.com	Invitation Sent	04/10/2025	-	

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.



Application & Review Management

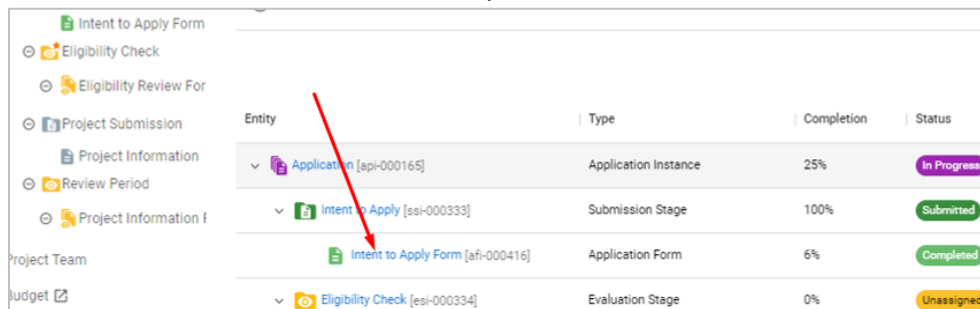
Program: Economic Development FY2024 - ED05 [p-4299]

Home / Programs / Economic Development FY2024 - ED05 [p-4299] / Applications

OVERVIEW APPLICATIONS REVIEWS APPLICATION SETUP

Project Title	Submitter	Application Status	Start Date	End Date	Budget	Actions
[api-000170]		Not Started	04/01/2024	08/01/2024	\$0.00	
Regional Business Support Project - RBC [api-000164]		In Progress	04/01/2024	08/01/2024	\$0.00	
Grants Station Area Economic Plan [api-000171]		In Progress	04/19/2024	08/01/2024	\$0.00	
Community Business Support Project [api-000172]		In Progress	04/19/2024	08/01/2024	\$0.00	

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



Intent to Apply Form

Eligibility Check

Eligibility Review For

Project Submission

Project Information

Review Period

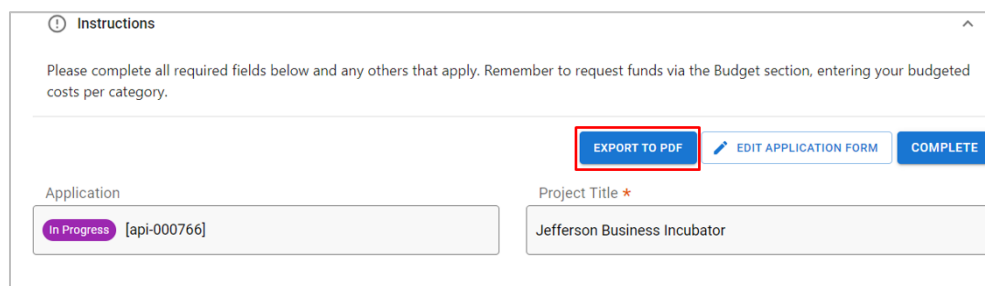
Project Information f

Project Team

Budget

Entity	Type	Completion	Status
Application [api-000165]	Application Instance	25%	In Progress
Intent to Apply [ssi-000333]	Submission Stage	100%	Submitted
Intent to Apply Form [afi-000416]	Application Form	6%	Completed
Eligibility Check [esi-000334]	Evaluation Stage	0%	Unassigned

3. Click Export to PDF



Instructions

Please complete all required fields below and any others that apply. Remember to request funds via the Budget section, entering your budgeted costs per category.

EXPORT TO PDF EDIT APPLICATION FORM COMPLETE

Application

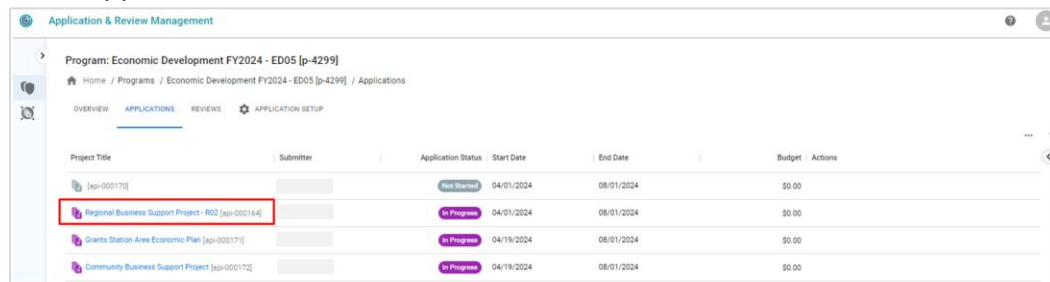
In Progress [api-000766]

Project Title *

Jefferson Business Incubator

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



Application & Review Management

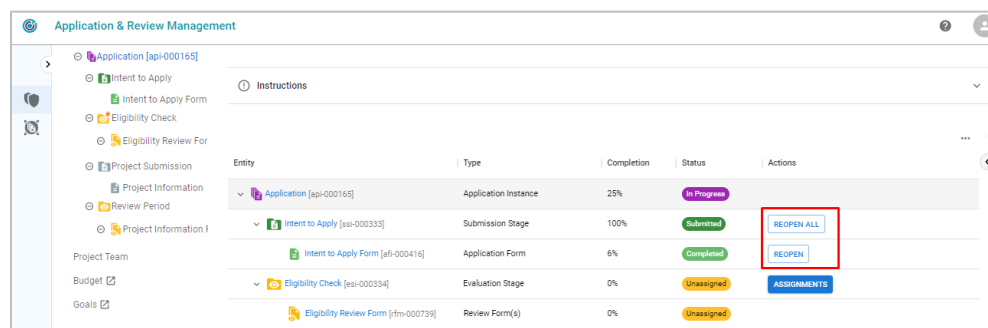
Program: Economic Development FY2024 - ED05 [p-4299]

Home / Programs / Economic Development FY2024 - ED05 [p-4299] / Applications

OVERVIEW APPLICATIONS REVIEWS APPLICATION SETUP

Project Title	Submitter	Application Status	Start Date	End Date	Budget	Actions
[api-000170]		Not Started	04/01/2024	08/01/2024	\$0.00	
Regional Business Support Project - R02 [api-000164]		In Progress	04/01/2024	08/01/2024	\$0.00	
Grants Station Area Economic Plan [api-000171]		In Progress	04/01/2024	08/01/2024	\$0.00	
Community Business Support Project [api-000172]		In Progress	04/19/2024	08/01/2024	\$0.00	

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



Application & Review Management

Application [api-000165]

Intent to Apply

Intent to Apply Form

Eligibility Check

Eligibility Review For

Project Submission

Project Information

Review Period

Project Information I

Project Team

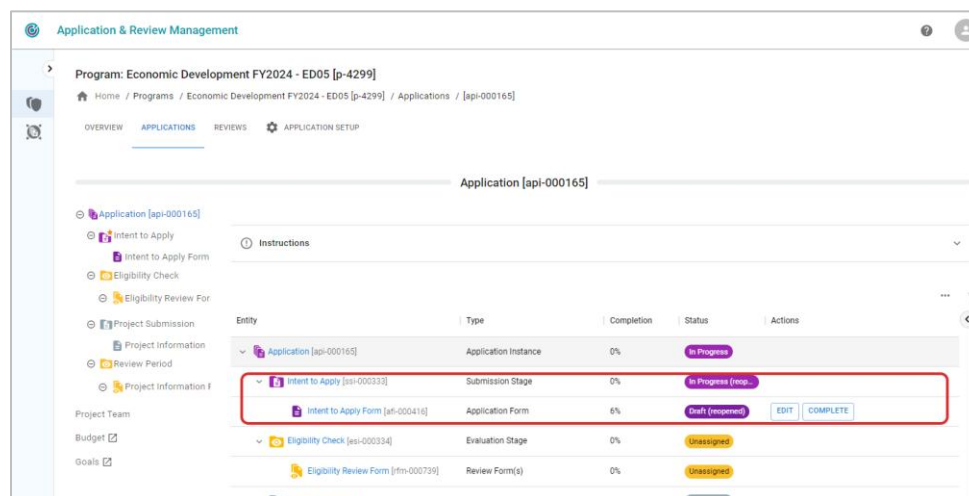
Budget

Goals

Instructions

Entity	Type	Completion	Status	Actions
Application [api-000165]	Application Instance	25%	In Progress	
Intent to Apply [api-000333]	Submission Stage	100%	Submitted	REOPEN ALL
Intent to Apply Form [api-000416]	Application Form	6%	Completed	REOPEN
Eligibility Check [api-000334]	Evaluation Stage	0%	Unassigned	ASSIGNMENTS
Eligibility Review Form [api-000739]	Review Form(s)	0%	Unassigned	

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.



Application & Review Management

Program: Economic Development FY2024 - ED05 [p-4299]

Home / Programs / Economic Development FY2024 - ED05 [p-4299] / Applications / [api-000165]

OVERVIEW APPLICATIONS REVIEWS APPLICATION SETUP

Application [api-000165]

Instructions

Entity	Type	Completion	Status	Actions
Application [api-000165]	Application Instance	0%	In Progress	
Intent to Apply [api-000333]	Submission Stage	0%	In Progress (reopened)	
Intent to Apply Form [api-000416]	Application Form	6%	Draft (reopened)	EDIT COMPLETE
Eligibility Check [api-000334]	Evaluation Stage	0%	Unassigned	
Eligibility Review Form [api-000739]	Review Form(s)	0%	Unassigned	

Request Submission Form [api-000334] Submission Stage 0% Unassigned

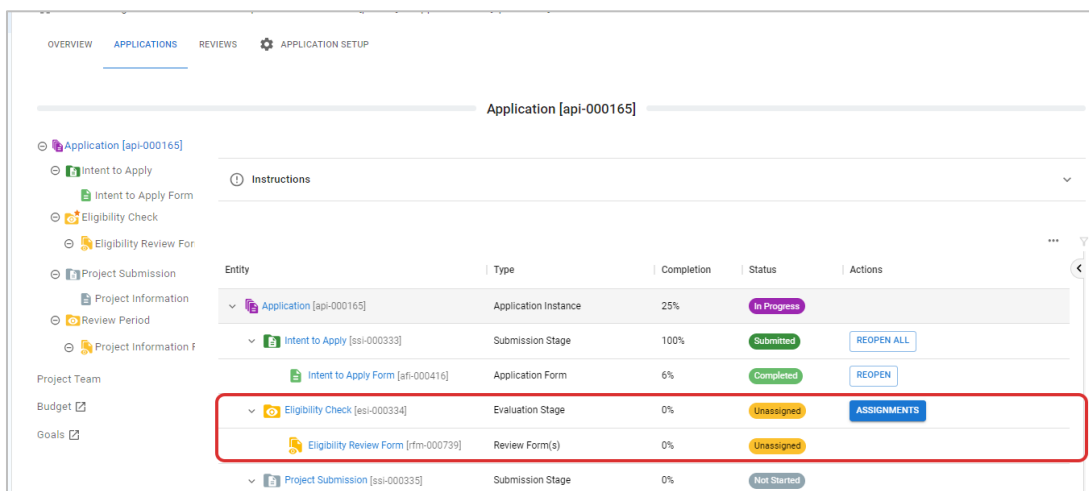
Managing Reviews

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.

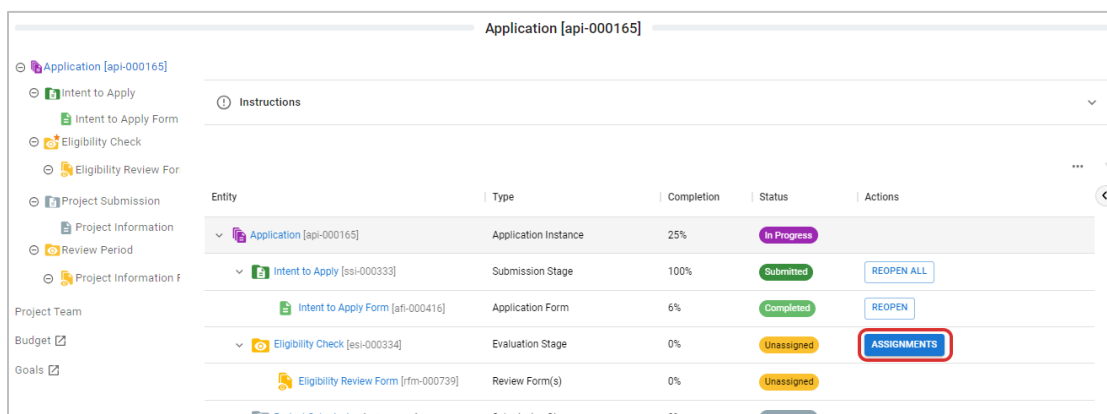
Reviewers can be assigned one of two ways:

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.



- 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.



Assignments of Evaluation Stage: Evaluation Process [esi-000105]

Assigned

Assigned Reviewer	Total Assigned	Not Started	In Progress	Submitted (since inception)	Actions
No rows					



0-0 of 0 < >

Reviewers Pool


Name	Total Assigned	Not Started	In Progress	Submitted (since inception)	Actions
	1	0	0	1	ASSIGN 
	1	0	0	1	ASSIGN 

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

Reviewers Pool

Name	Total Assigned	Not Started	In Progress	Submitted (since inception)	Actions
	1	0	0	1	ASSIGN 
	1	0	0	1	ASSIGN 

- Click **Yes** to confirm.

 **Assign Reviewer**

Are you sure?

YES

CANCEL

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

← Assignments of Evaluation Stage: Evaluation Process [esi-000105]

Assigned

Assigned Reviewer	Total Assigned	Not Started	In Progress	Submitted (since inception)	Actions
[Reviewer Name]	2	1	0	1	MANAGE ASSIGNMENTS

1-1 of 1

Reviewers Pool

Name	Total Assigned	Not Started	In Progress	Submitted (since inception)	Actions
[Reviewer Name]	1	0	0	1	ASSIGN

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:
- Reassign & Keep Content: Move the assignments and review form content to another Reviewer account.
 - Reassign & Delete Content: Move the assignment to another Reviewer account but delete the review form content.
 - Unassign & Delete Content: Remove the assignment from this Reviewer and delete any review form content created by this Reviewer.

← Assignments of Evaluation Stage: Eligibility Check [esi-000330]

Assigned

Assigned Reviewer	Total Assigned	Not Started	In Progress	Submitted (since inception)	Actions
John Doe	10	10	10	10	MANAGE ASSIGNMENTS Reassign & Keep Content Reassign & Delete Content Unassign & Delete Content

1-1 of 1

Reviewers Pool

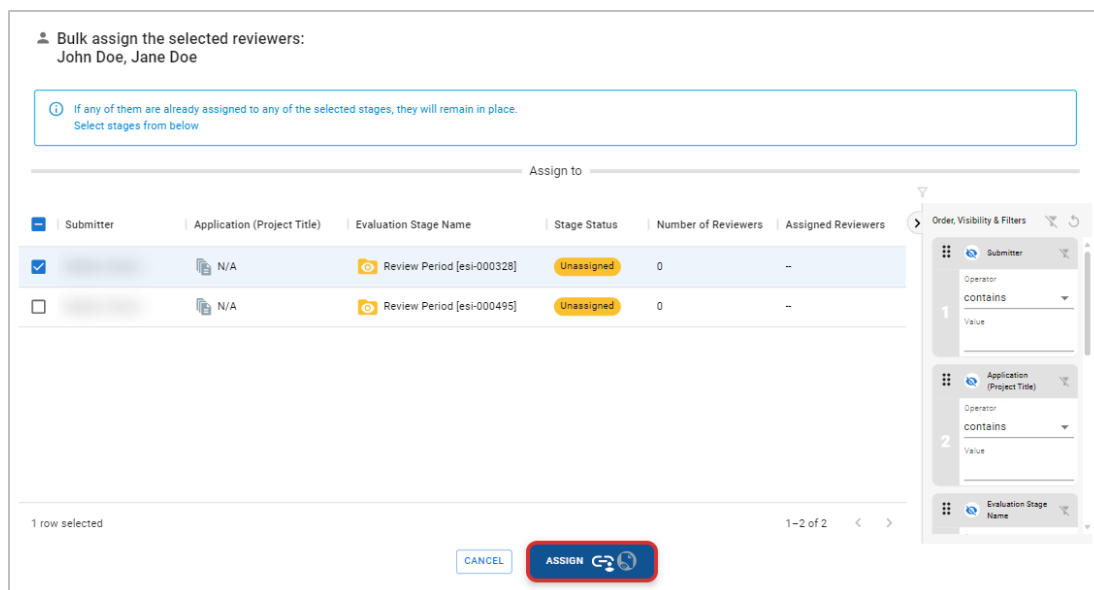
Name	Total Assigned	Not Started	In Progress	Submitted (since inception)	Actions
Jane Doe	11	11	11	11	ASSIGN

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**

Users may take up to five minutes to appear in the list after they are added in Grants Network.

Assign Applications to Reviewers ▾


BULK ASSIGN 

Submitter	Application (Project Title)	Evaluation Stage Name	Stage Status	Number of Reviewers	Assigned Reviewers
<input checked="" type="checkbox"/>	N/A	Review Period [esi-0...	Unassigned	0	--
<input type="checkbox"/>	N/A	Review Period [esi-0...	Unassigned	0	--


Order, Visibility & Filters

Submitter
Operator
contains
Value

Application (Project Title)
Operator



 Bulk assign the selected evaluation stage(s): [esi-000328]

Assigned to

Assigned Reviewer	Total Assigned	Not Started	In Progress	Submitted (since inception)	Actions
John Doe	0	0	0	0	

1-1 of 1 < >

Reviewers Pool

Name	Total Assigned	Not Started	In Progress	Submitted (since inception)	Actions
John Doe	0	0	0	0	ASSIGN 
Jane Doe	0	0	0	0	ASSIGN 

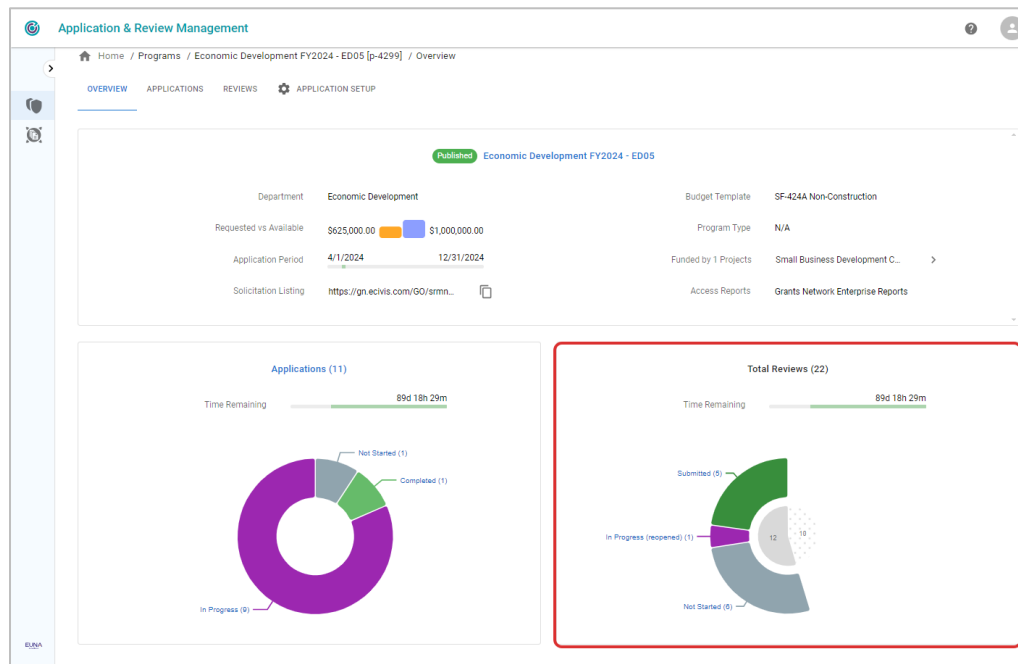
2. Manage Assigned Reviews: View all assignments made and reassign or unassign using the **Bulk Manage Assignments** button.

The screenshot shows the 'Manage Assigned Reviews' page for the program 'Economic Development FY2024 - ED05 [p-4299]'. The page has a sidebar with navigation links: OVERVIEW, APPLICATIONS, REVIEWS (selected), and APPLICATION SETUP. A dropdown menu 'Manage Assigned Reviews' is open, showing a 'BULK MANAGE ASSIGNMENTS' button. Below this, a table lists review assignments for reviewer 'John Doe'. The table has columns: Reviewer, Project Title, Application ID, Submitter, Stage Name, Stage ID, Stage Status, and Form ID. Two rows are visible, both for 'Eligibility Check' stage, with application IDs 'api-000166' and 'api-000167', both submitted. A dropdown menu is open for the first row, showing options: 'Reassign & Keep Content', 'Reassign & Delete Content', and 'Unassign & Delete Content'.

Reviewer	Project Title	Application ID	Submitter	Stage Name	Stage ID	Stage Status	Form ID
John Doe		api-000166	Anthony Torres	Eligibility Check	esi-000338	Submitted	
							rfm-000739 Eligibility Review... rfi-000420
		api-000167	Anthony Torres	Eligibility Check	esi-000342	Submitted	
							rfm-000739 Eligibility Review... rfi-000424

Monitoring Reviews

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



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

Program: Economic Development FY2024 - ED05 [p-4299]

Home / Programs / Economic Development FY2024 - ED05 [p-4299] / Applications

OVERVIEW **APPLICATIONS** REVIEWS APPLICATION SETUP

Project Title	Submitter	Application Status	Start Date	End Date
Business Incubator Impact Plan [api-000173]		In Progress	04/19/2024	08/01/2024
Community Business Support Project [api-000172]		In Progress	04/19/2024	08/01/2024
Economic Growth Initiative [api-000174]		In Progress	04/19/2024	08/01/2024
Grants Station Area Economic Plan [api-000171]		In Progress	04/19/2024	08/01/2024
Regional Business Support Project - R02 [api-000164]		In Progress	04/01/2024	08/01/2024

- 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.

Program: Economic Development FY2024 - ED05 [p-4299]

Home / Programs / Economic Development FY2024 - ED05 [p-4299] / Applications / [api-000166] / Eligibility Check [esi-000338] / Eligibility Review Form [rfm-000739] / Details

OVERVIEW **APPLICATIONS** REVIEWS APPLICATION SETUP

Application [api-000166]

DETAILS & STATUSES MASTER LAYOUT COMPARE REVIEWS

- Application [api-000166]
 - Intent to Apply
 - Intent to Apply Form
 - Eligibility Check
 - Eligibility Review Form**
 - Review by Jane Doe
 - Review by John Doe
 - Project Submission
 - Project Information
 - Review Period
 - Project Information Review Form

Entity	Type	Completion	Status	Actions
Eligibility Review Form [rfm-000739]	Review Form(s)	50%	In Progress	
Review by Jane Doe [rfi-000421]	Review Content	100%	Completed	REOPEN
Review by John Doe [rfi-000497]	Review Content	0%	Not Started	EDIT

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

Application [api-000166]

DETAILS & STATUSES **MASTER LAYOUT** COMPARE REVIEWS

- Application [api-000166]
 - Intent to Apply
 - Intent to Apply Form
 - Eligibility Check
 - Eligibility Review Form**
 - Review by Jane Doe
 - Review by John Doe
 - Project Submission
 - Project Information
 - Review Period
 - Project Information Review Form

Project Team

Budget ☒

Goals ☒

Application Forms to Review

Intent to Apply Form

Application Project Title *

ORGANIZATION SUBMITTING APPLICATION

Organization Name *

Employer Identifica Unique Entity Ident DUNS Number

Review Form Layout [layout]

FORM META SETTINGS & INFO

Form Instructions *

Please fill the below form to evaluate the intent to Apply submission for eligibility.

Does the information provided present any material conflict of interest (per code 1.117) (R-03544) *

☐ Yes ☐ No

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

Application & Review Management

Program: Economic Development FY2024 - ED05 [p-4299]

Home / Programs / Economic Development FY2024 - ED05 [p-4299] / Applications / [api-000164] / Eligibility Check [esi-000330] / Eligibility Review Form [rfm-000739] / Compare Reviews

OVERVIEW APPLICATIONS REVIEWS APPLICATION SETUP

Application [api-000164]

DETAILS & STATUSES MASTER LAYOUT **COMPARE REVIEWS**

- Application [api-000164]
 - Intent to Apply
 - Intent to Apply Form
 - Eligibility Check
 - Eligibility Review Form**
 - Review by John Doe
 - Review by Jane Doe
 - Project Submission
 - Project Information
 - Review Period
 - Project Information Review

Reviewer	Review	Completion	Score	Overall Comments	Specifics
John Doe	E [rfi-000420]	100%	N/A	--	--
Jane Doe	E [rfi-000421]	100%	N/A	--	--
John Doe	E [rfi-000424]	75%	N/A	--	--
Jane Doe	E [rfi-000425]	75%	N/A	--	--

Re-Open a Review

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

OVERVIEW **APPLICATIONS** REVIEWS APPLICATION SETUP

Application [api-000166]

Instructions

Entity	Type	Completion	Status	Actions
Application [api-000166]	Application Instance	50%	In Progress	
Intent to Apply [ssi-000337]	Submission Stage	100%	Submitted	REOPEN ALL
Intent to Apply Form [afi-000418]	Application Form	6%	Completed	REOPEN
Eligibility Check [esi-000338]	Evaluation Stage	100%	Submitted	REOPEN ALL
Eligibility Review Form [rfm-000739]	Review Form(s)	100%	Completed	
Review by Jane Doe [rfi-000421]	Review Content	100%	Completed	REOPEN
Review by John Doe [rfi-000497]	Review Content	75%	Completed	REOPEN
Project Submission [ssi-000339]	Submission Stage	0%	Not Started	

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

Application [api-000166]

Instructions

Entity	Type	Completion	Status	Actions
Application [api-000166]	Application Instance	25%	In Progress	
Intent to Apply [ssi-000337]	Submission Stage	100%	Submitted	REOPEN ALL
Intent to Apply Form [afi-000418]	Application Form	6%	Completed	REOPEN
Eligibility Check [esi-000338]	Evaluation Stage	50%	In Progress (reopened)	ASSIGNMENTS REOPEN ALL
Eligibility Review Form [rfm-000739]	Review Form(s)	50%	In Progress (reopened)	
Review by Jane Doe [rfi-000421]	Review Content	100%	Draft (reopened)	EDIT COMPLETE
Review by John Doe [rfi-000497]	Review Content	75%	Completed	REOPEN

Project Team

Budget ☒

Goals ☒

Project Submission [api-000300] Submission Stage 0% Done

Reviewer Experience

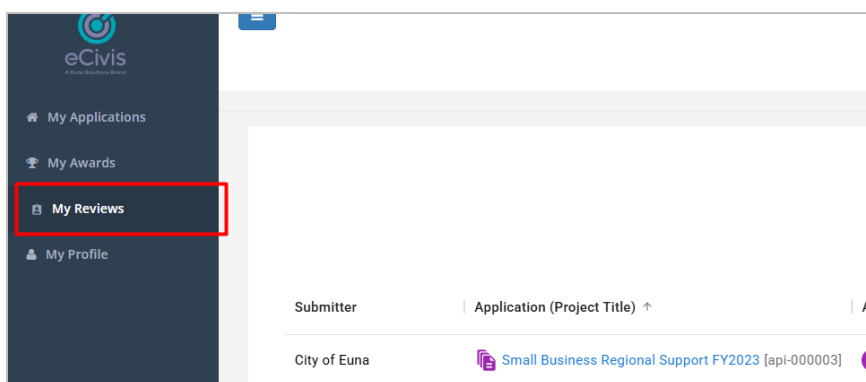
The sections below will discuss how a Reviewer will access and complete their Review Forms. The access point depends on whether the Reviewer is external to the Program team or part of the Program team (having access to the ARM dashboards).

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.

Active Reviews				
Submitter	Application (Project Title) ↑	Active Stage	Review Form	Review Form Status
Eunaville	Grants Station Area Economic Plan [api-000171]	Eligibility Check [esi-000358]	Eligibility Review Form [rfi-000449]	Not Started
Township of EUNA	Community Business Support Project [api-000172]	Eligibility Check [esi-000362]	Eligibility Review Form [rfi-000451]	In Progress

Inactive Reviews					
Submitter	Application (Project Title) ↑	Review Form	Review Form Status	Started	Last Edited
City of Euna	Small Business R... [api-000003]	Review... [rfi-000010]	Not Started	Not Started	Not Started
City of Euna II	Small Business R... [api-000006]	Review... [rfi-000018]	Submitted	11/09/2023	11/09/2023
Euna County	Community Devel... [api-000050]	Review... [rfi-000041]	Submitted	12/06/2023	12/06/2023

- 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.

Submitter	Application (Project Title) ↑	Active Stage	Review Form	Review Form Status	Remaining Time	Started	Last Edited
Eunaville	Grants Station Area Economic Plan [api-000171]	Eligibility Check [esi-000358]	Eligibility Review Form [rfi-000449]	Not Started	61d 12h 44m	Not Started	Not Started
Township of EUNA	Community Business Support Project [api-000172]	Eligibility Check [esi-000362]	Eligibility Review Form [rfi-000451]	In Progress	61d 12h 44m	04/26/2024	04/25/2025

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

!

Instructions

Applicants must first complete the Intent to Apply form and submit for an eligibility check. If eligible, applicants will then be able to submit project information for consideration by the program review committee. You will receive notification of an award decision thereafter as to whether your application submission is awarded or denied.

Entity	Type	Completion	Status	Actions
Application [api-000172]	Application Instance			
Eligibility Check [esi-000362]	Evaluation Stage			
Eligibility Review Form [rfm-000739]	Review Form(s)			
Review by Jane Doe [rfi-000451]	Review Content	0%	Not Started	EDIT
Review Period [esi-000364]	Evaluation Stage			

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

Eligibility Review Form

Review by Jane Doe

Project Team

Budget

Goals

Application Forms to Review

Intent to Apply Form

Application

Status [.]

Project Title *

Regional Business Support Project - R03

ORGANIZATION SUBMITTING APPLICATION

Organization Name *

City of EUNA

Employer Ident

Unique Entity I

DUNS Number

ORGANIZATION ADDRESS

Street Address

Apt, Suite, etc.

0% completed

Does the information provided present any material conflict of interest (per code 1.11)? *

☐ Yes
 ☒ No

Project Narrative Score *

9

Rate this field on a scale of 1-10 with 10 being the highest.

Project Narrative Comments

The application effectively explained the project and this seems to be a great fit!

Does the project serve within the approved geographical area?

☒ Yes
 ☐ No

***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.

The screenshot shows a review form with a 'Phone Extension' field on the left and a 'Sustainability Plan Comments' text area on the right. Below the comments, a 'Total Score' is displayed as '17 / (out of 20)', which is highlighted with a red rectangular border.

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

This screenshot shows the full review interface for 'Application [api-000165]'. On the left is a sidebar with navigation links. The main area is divided into 'Application Forms to Review' (showing 'Intent to Apply Form' details) and a '0% completed' section with rating questions. The 'SAVE' button in the top right corner is highlighted with a red border.

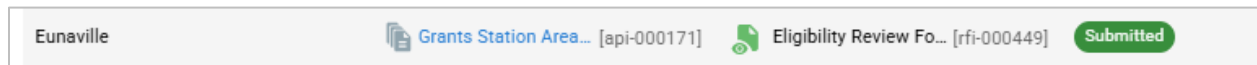
***Note:** To export a copy of the filled Review Form to PDF format, click **Export to PDF** from the top-right corner of the page

This screenshot shows the bottom portion of the review page. It includes the instruction 'Please fill the below form to evaluate the Intent to Apply submission for eligibility.' and three buttons: 'EXPORT TO PDF' (highlighted with a red border), 'EDIT REVIEW', and 'COMPLETE'. Below these is a progress bar for 'Application Forms to Review' showing '100% completed'.

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

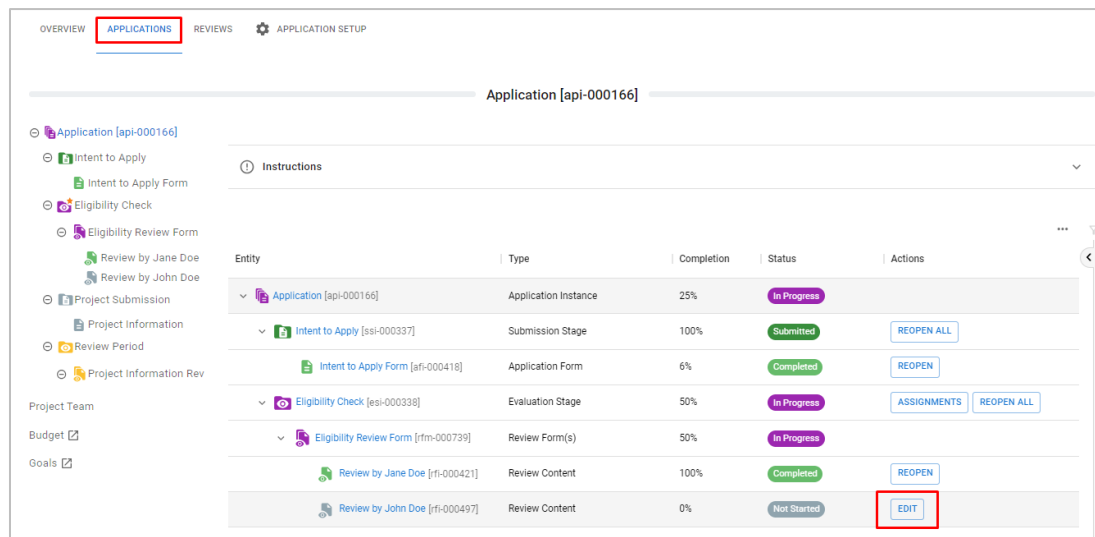
This screenshot shows the review page with the 'COMPLETE' button in the top right corner highlighted with a red border. The progress bar for 'Application Forms to Review' now shows '100% completed'.

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

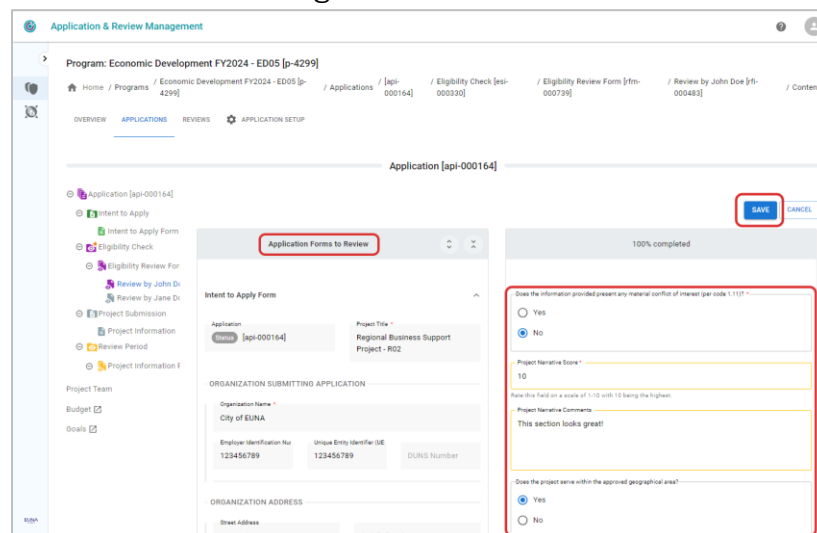


Completing Review Forms within the Application and Review Manager

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.



Application [api-000164]

100% completed

Does the information provided present any material conflict of interest per code 1.113?

☐ Yes

☒ No

Project Narrative Score: 10

How this field are a scale of 1-10 with 10 being the highest.

Project Narrative Comments: This section looks great!

Does the project serve within the approved geographical area?

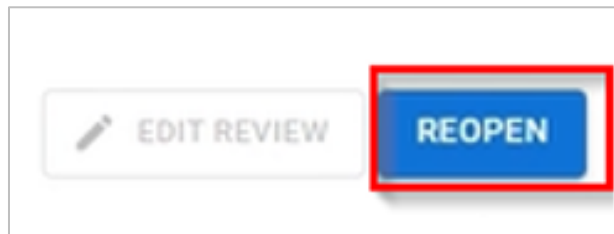
☒ Yes

☐ No

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

The screenshot shows the 'Application & Review Management' interface. The breadcrumb trail is: Home / Programs / Economic Development FY2024 - ED05 [p-4299] / Applications / [api-000164] / Eligibility Check [esi-000330] / Eligibility Review Form [rfm-000739] / Review by John Doe [rf-000483] / Content. The left sidebar contains a list of steps: Application [api-000164], Intent to Apply, Intent to Apply Form, Eligibility Check, Review by John Doe, Review by Jane Doe, Project Submission, Project Information, Review Period, and Project Information Form. The main content area shows the 'Application [api-000164]' form, which is 100% completed. The form includes sections for 'Intend to Apply Form', 'ORGANIZATION SUBMITTING APPLICATION', and 'ORGANIZATION ADDRESS'. The 'COMPLETE' button is highlighted with a red box.

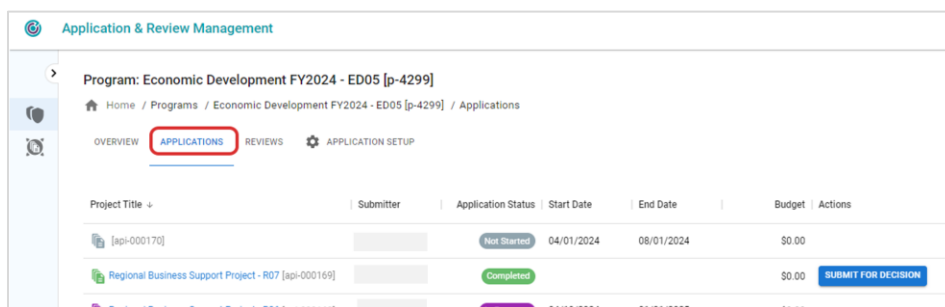
4. Once you click on the Complete button a **Reopen** button will appear if you need to make further edits.



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.



Application & Review Management

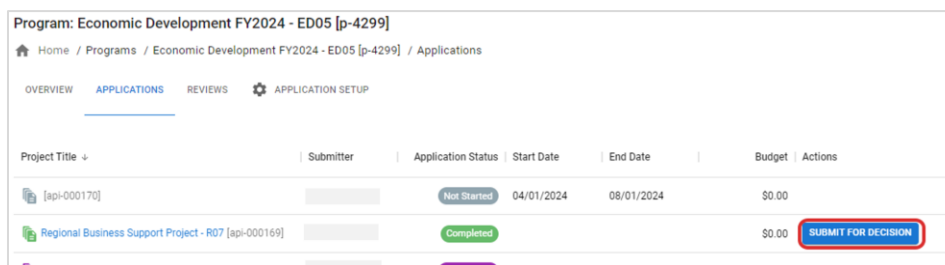
Program: Economic Development FY2024 - ED05 [p-4299]

Home / Programs / Economic Development FY2024 - ED05 [p-4299] / Applications

OVERVIEW APPLICATIONS REVIEWS APPLICATION SETUP

Project Title	Submitter	Application Status	Start Date	End Date	Budget	Actions
[api-000170]		Not Started	04/01/2024	08/01/2024	\$0.00	
Regional Business Support Project - R07 [api-000169]		Completed			\$0.00	SUBMIT FOR DECISION
Regional Business Support Project - R06 [api-000168]		In Progress	04/19/2024	01/01/2025	\$0.00	

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



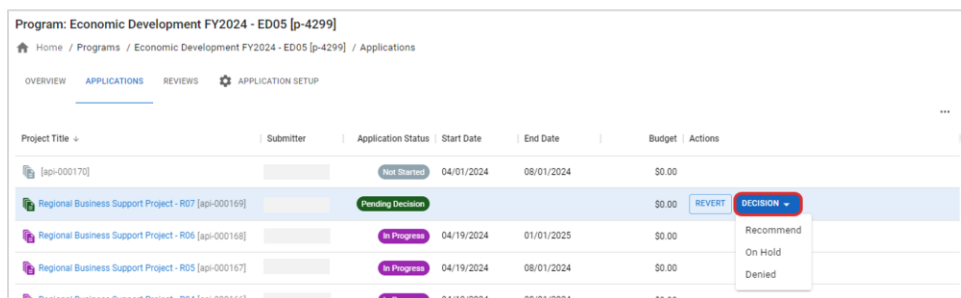
Program: Economic Development FY2024 - ED05 [p-4299]

Home / Programs / Economic Development FY2024 - ED05 [p-4299] / Applications

OVERVIEW APPLICATIONS REVIEWS APPLICATION SETUP

Project Title	Submitter	Application Status	Start Date	End Date	Budget	Actions
[api-000170]		Not Started	04/01/2024	08/01/2024	\$0.00	
Regional Business Support Project - R07 [api-000169]		Completed			\$0.00	SUBMIT FOR DECISION
Regional Business Support Project - R06 [api-000168]		In Progress	04/19/2024	01/01/2025	\$0.00	

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



Program: Economic Development FY2024 - ED05 [p-4299]

Home / Programs / Economic Development FY2024 - ED05 [p-4299] / Applications

OVERVIEW APPLICATIONS REVIEWS APPLICATION SETUP

Project Title	Submitter	Application Status	Start Date	End Date	Budget	Actions
[api-000170]		Not Started	04/01/2024	08/01/2024	\$0.00	
Regional Business Support Project - R07 [api-000169]		Pending Decision			\$0.00	REVERT DECISION
Regional Business Support Project - R06 [api-000168]		In Progress	04/19/2024	01/01/2025	\$0.00	
Regional Business Support Project - R05 [api-000167]		In Progress	04/19/2024	08/01/2024	\$0.00	
Regional Business Support Project - R04 [api-000166]		In Progress	04/19/2024	08/01/2024	\$0.00	

Recommend

On Hold

Denied

- 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.

Program: Economic Development FY2024 - ED [p-3776]

Home / Programs / Economic Development FY2024 - ED [p-3776] / Applications

OVERVIEW APPLICATIONS REVIEWS APPLICATION SETUP

Project Title	Submitter	Application Status	Start Date	End Date	Budget	Actions
Regional Business Support Project [api-000054]		Decision Rec. Award			\$0.00	
Grants Station Area Economic Plan [api-000156]		Decision Rec. Award			\$0.00	
Economic Growth Initiative [api-000158]		Decision On Hold			\$0.00	REVERT RECOMMEND

- 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.

Program: Economic Development FY2024 - ED05 [p-4299]

Home / Programs / Economic Development FY2024 - ED05 [p-4299] / Applications

OVERVIEW APPLICATIONS REVIEWS APPLICATION SETUP

Project Title	Submitter	Application Status	Start Date	End Date	Budget	Actions
[api-000170]		Not Started	04/01/2024	08/01/2024	\$0.00	
Regional Business Support Project - R07 [api-000169]		Decision On Hold			\$0.00	REVERT RECOMMEND
Regional Business Support Project - R06 [api-000168]		In Progress	04/19/2024	01/01/2025	\$0.00	
Regional Business Support Project - R05 [api-000167]		In Progress	04/19/2024	01/01/2025	\$0.00	

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

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

Program: Economic Development FY2024 - ED05 [p-4299]

Home / Programs / Economic Development FY2024 - ED05 [p-4299] / Applications

OVERVIEW APPLICATIONS REVIEWS APPLICATION SETUP

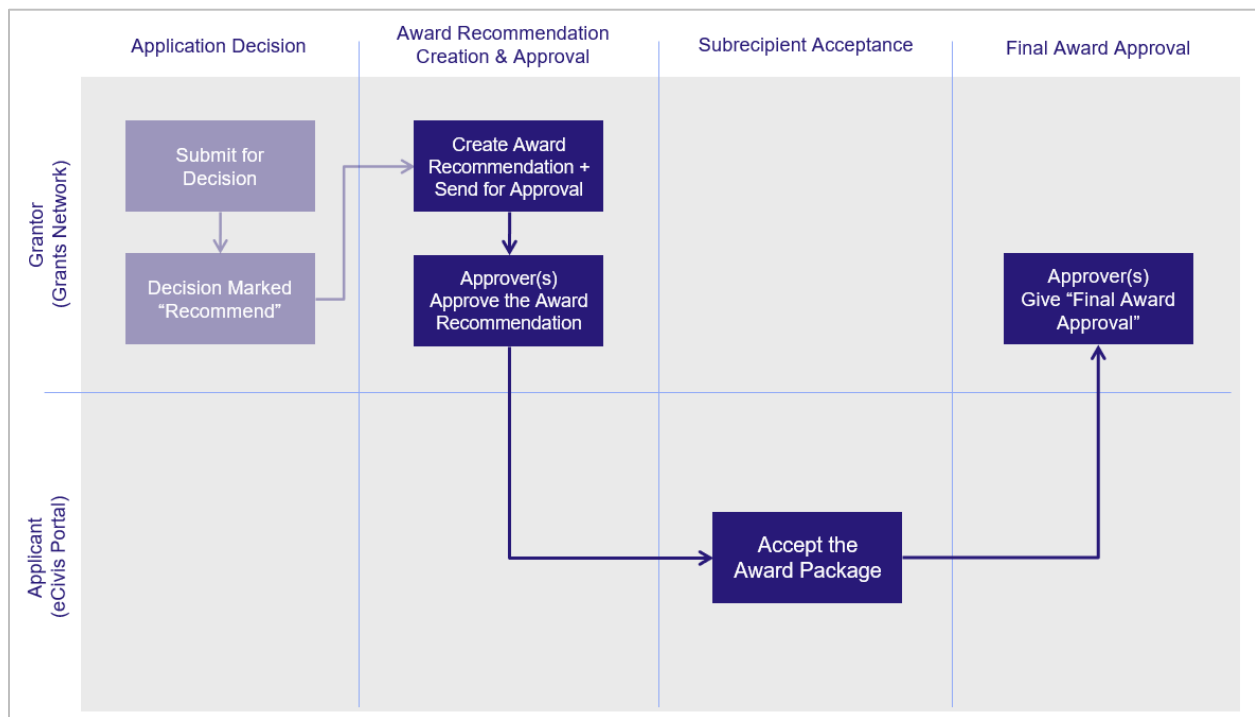
Project Title	Submitter	Application Status	Start Date	End Date	Budget	Actions
[api-000170]		Not Started	04/01/2024	08/01/2024	\$0.00	
Regional Business Support Project - R07 [api-000169]		Decision Denied			\$0.00	REVERT
Regional Business Support Project - R06 [api-000168]		In Progress	04/19/2024	01/01/2025	\$0.00	

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**.

Subrecipient Reporting Subrecipient Monitoring Edit Solicitation Application Management Ext. Solicitation Listing

Search:

Award Recommendation Approval

Project	Org Name	Award/ Contract Number	Award Approved	Links	Priority	Actions	
Grants Station Area Economic Plan	Eunaville		\$154,000.00	Award Package / Budget / Goals		Actions	<input type="checkbox"/>

Showing 1 to 1 of 1 entries

Reload Approve

Initiate Direct Award

Search:

Pending Awards

Include Rejected Awards ☐

Project	Org Name	Award Manager	Award/ Contract Number	Recommendation Status	Current Approver	Priority	Actions	
Regional Business Support Project	City of EUNA			Recommendation Pending	N/A		Actions	<input type="checkbox"/>
Community Business Support Project	Township of EUNA			Recommendation Pending	N/A		Actions	<input type="checkbox"/>

Create Recommendation

SUPPORT

2. Fill the details of the Recommendation:

Award Recommendation Approval Task Creation

Recipient: City of EUNA

Project: Regional Business Support Project - R07

Subrecipient: City of Anthony

Payment Profile: City of Anthony Public Works


Subrecipient Risk: Low

Priority: Medium

Award Manager: A Trainer

External Note:*

- 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**.

Performance Period Start:* 

View/Edit Award Budget: [Award Budget](#)






Total Budget Requested: \$125,000.00 [Refresh Award Total](#)
Total Match Requested: \$0.00

View/Edit Application goals: [Application Goals](#)

- 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]

Application Budget for City of EUNA
 Program: Economic Development FY2024 - ED05
 Project name: Regional Business Support Project - R07

Budget Stage: Pre-Award

Actions:     


Budget Summary

\$125,000.00	Total Direct Costs	\$0.00	Match / Cost Share
\$0.00	Total Indirect Costs	\$0.00	Program Income
\$125,000.00	Total Amount (Direct + Indirect)		

Budget Settings


Budget Items

- 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**.

View/Edit Award Budget: [Award Budget](#) 

Total Budget Requested: \$125,000.00 [Refresh Award Total](#)

Total Match Requested: \$0.00

View/Edit Application goals: [Application Goals](#) 

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

- ii. Edit the target unit values, if necessary.

Goal / Objective	Target Units	Direct Cost Expenditure	Matching Expenditure	Program Income Expenditure
Provide SBDC Training	0.00	\$ 0.00	\$ 0.00	\$ 0.00
Subgoals				
SBDC Training Session #1 Participants	0.00	\$ 0.00	\$ 0.00	\$ 0.00
SBDC Training Session #2 Participants	0.00	\$ 0.00	\$ 0.00	\$ 0.00

[Return to Application](#)
[Save Goals](#)

- 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.

View/Edit Award Budget: [Award Budget](#)

Total Budget Requested: \$125,000.00 [Refresh Award Total](#)

Total Match Requested: \$2,500.00

View/Edit Application goals: [Application Goals](#)

Allocate Funding:

	Total Funding	Funding Available	Subrecipient Award
ORG0000 Small Business Development Center (SBDC) Program	\$ 1,000,000.00	\$ 838,000.00	\$ 125,000.00
Award Total			\$ 125,000.00

Match Type: Cash

	Cash Match Total:*	In-Kind Match Total:	Total Match
	\$ 2,500.00	\$ 0.00	\$ 2,500.00


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


Define an optional frequency for the Financial Report task ⓘ
[Reset to program default](#)

Frequency: Monthly

Interval*: Every 3 months

On*: ☐ A day of the month
☒ The last day of the month

Starting*: 03/31/2020 

Until: 12/31/2020 


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


Define an optional frequency for the Activity Report task ⓘ
[Reset to program default](#)

Frequency: Monthly

Interval*: Every 3 months

On*: ☐ A day of the month
☒ The last day of the month


Starting*: 03/31/2020 

Until: 12/31/2020 

- 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.

Award Notification File

The award notification file contains 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.

Award Files - External:

Please 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.

Attach Files

Search:

File Name	Uploaded Date	File Size	Actions
No files have been uploaded			

Showing 0 to 0 of 0 entries

[Previous](#) [Next](#)

- 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.

Award Files - Internal:

Please 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.

Attach Files

Show entries

Search:

File Name	Uploaded Date	File Size	Actions
No data available in table			

Showing 0 to 0 of 0 entries

[Previous](#) [Next](#)

3. Click **Send For Approval**

Showing 0 to 0 of 0 entries

Save RecommendationSend for ApprovalCancel

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

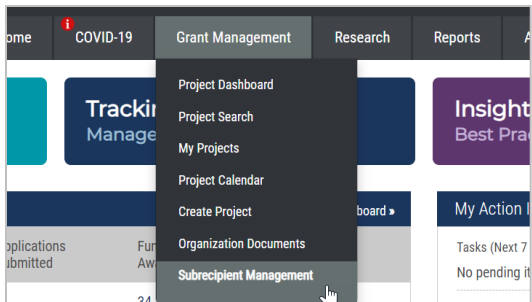
4. Click the hyperlinked Recommendation Status and view the Current Approver column in the Pending Awards table to view the progress of the approval (especially in the case of a sequential group approval).

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:

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	<input type="checkbox"/>	

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.

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	<input checked="" type="checkbox"/>

Showing 1 to 1 of 1 entries

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

Priority	Actions	
Medium	Actions	<input type="checkbox"/>

[Return For Changes](#)

[Decline Award](#)

- 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

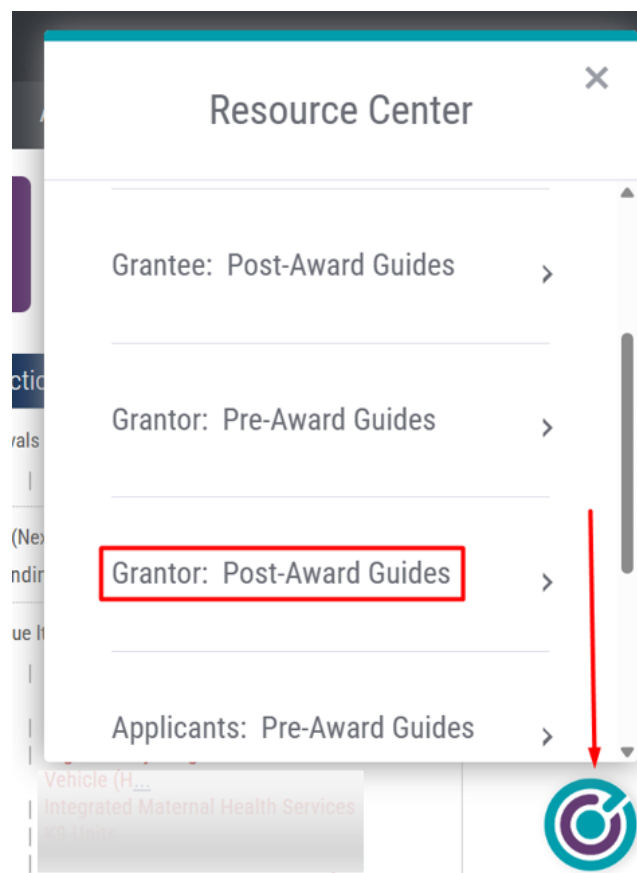
The awarded applicant will receive an email informing them of their Award Package. They will log into Portal to accept or return the package for changes. For more information on this process, see the [Accepting an Award](#) guide. (Location: Resource Center > Subrecipient: Post-Award Guides > Accepting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

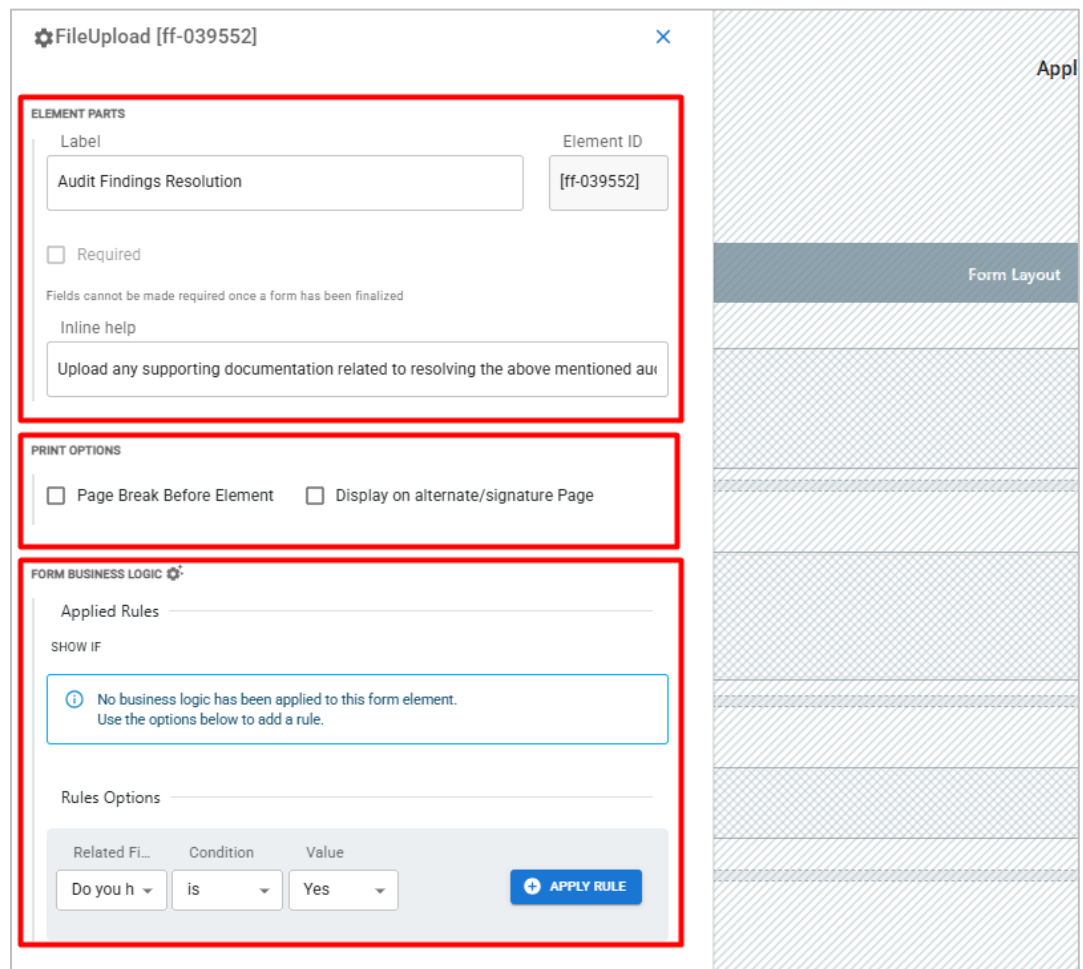
Once a form field is added to an Application or Review Form, you can edit, duplicate, delete, or move this field using the options below:

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



The screenshot shows a 'Text Area' form field. In the top right corner of the field's container, there is a toolbar with four icons: a pencil (edit), a document with a plus sign (duplicate), a trash can (delete), and a grid of four squares (move). The pencil icon is highlighted with a red rectangular box.

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



The screenshot shows a settings panel for a 'FileUpload' form field. The panel is titled 'FileUpload [ff-039552]' and has a close button (X) in the top right. It contains three main sections, each highlighted with a red border:

- ELEMENT PARTS:** This section includes a 'Label' field with the text 'Audit Findings Resolution', an 'Element ID' field with the text '[ff-039552]', a 'Required' checkbox (unchecked), and an 'Inline help' text area containing the text 'Upload any supporting documentation related to resolving the above mentioned au'.
- PRINT OPTIONS:** This section includes two checkboxes: 'Page Break Before Element' (unchecked) and 'Display on alternate/signature Page' (unchecked).
- FORM BUSINESS LOGIC:** This section includes a 'SHOW IF' section with a message: 'No business logic has been applied to this form element. Use the options below to add a rule.' Below this is a 'Rules Options' section with a table for defining rules.

Related Fi...	Condition	Value
Do you h	is	Yes

At the bottom right of the 'Rules Options' section is a blue button labeled '+ APPLY RULE'.

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

A screenshot of a form configuration interface. It shows three dropdown menus: 'Related Field', 'Condition', and 'Value'. The 'Related Field' dropdown is open, showing a list of fields. The first field is 'Is this a capital project? (ff-052321)' and the second is 'Table Upload (ff-052244)'. The 'Condition' dropdown is set to 'is' and the 'Value' dropdown is set to 'unset'.

A screenshot of the same form configuration interface. The 'Related Field' dropdown is now closed, and the 'Condition' dropdown is open, showing a list of conditions: 'is', 'isn't', 'exists', and 'does not exist'. The 'Value' dropdown remains set to 'unset'.

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.

The screenshot shows a form field labeled 'Sustainability Plan Score' with a value of 7. Below it, a text area contains the comment: 'The applicants provided strong evidence of their sustainability plan within their attached spreadsheet model.' At the bottom right, a red-bordered box displays 'Total Score 17 (out of 20)'.

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.

The screenshot shows a 'Text Area' form field with the text 'Monitoring Plan (tmp-70)'. A red box highlights the copy icon (two overlapping squares) in the top right corner of the form field's toolbar.

The screenshot shows the 'Form Layout' editor. The form contains fields for 'Program Name' (Economic Development FY2024 - ED01) and 'Submission Stage' (Intent to Apply). Below these is a 'Form Instructions' section with a text area containing 'Fill out Core Information'. A red box highlights the copy icon in the top right corner of the form layout area. On the right, the 'Form Elements Toolbox' is visible, showing various form elements like 'Single Line Input', 'Paragraph Input', 'Email Input', 'Phone Number', and 'Number Input'.

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



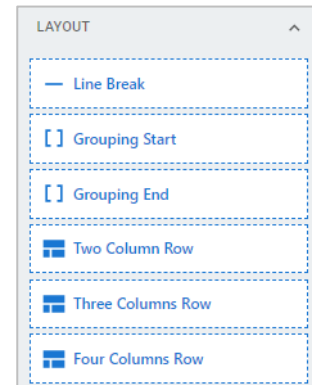
4. To move this field, click the grid icon and drag the field to another location



Appendix B: Form Elements Toolbox

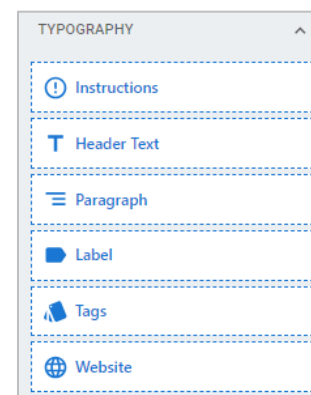
There are four categories of Form Elements for Application and Review Forms. See the descriptions below for how to use each element.

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.

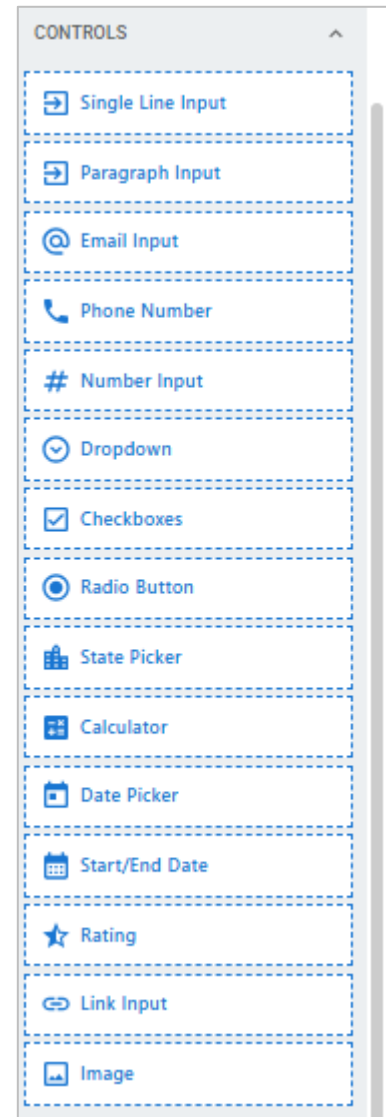
- a. **Instructions:** Provides a box of instructional text to be displayed
- b. **Header Text:** Provides a text heading to place above sections of the form
- c. **Paragraph:** Provides a piece of long-form text to be displayed above specific fields or sections of the form
- d. **Label:** Provides a 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

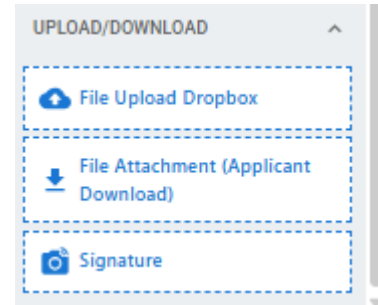
***Note:** Review Forms also come with a calculated “Total Score” display at the bottom of the form, allowing users to simply flag any numerical fields to add into that total score while they are building out the review form. [See Appendix A for more information].



- 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



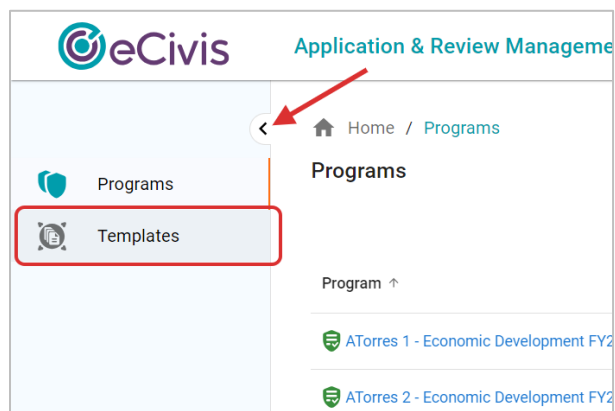
Appendix C: Templates

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.

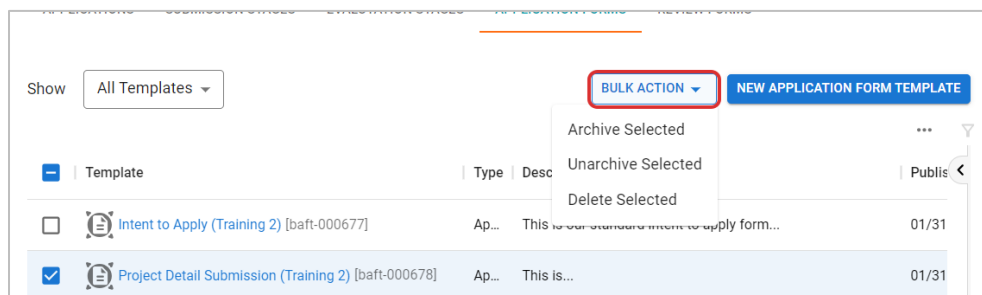
To access the Templates page, expand the left-hand navigation bar and select the **Templates** option.



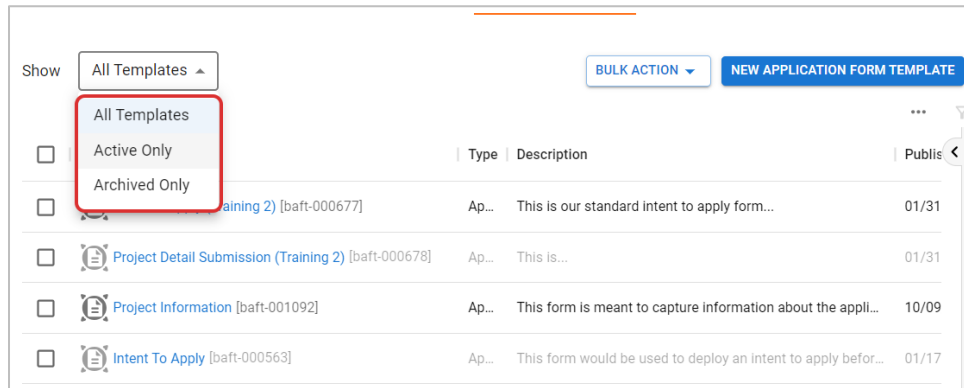
Template Management

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

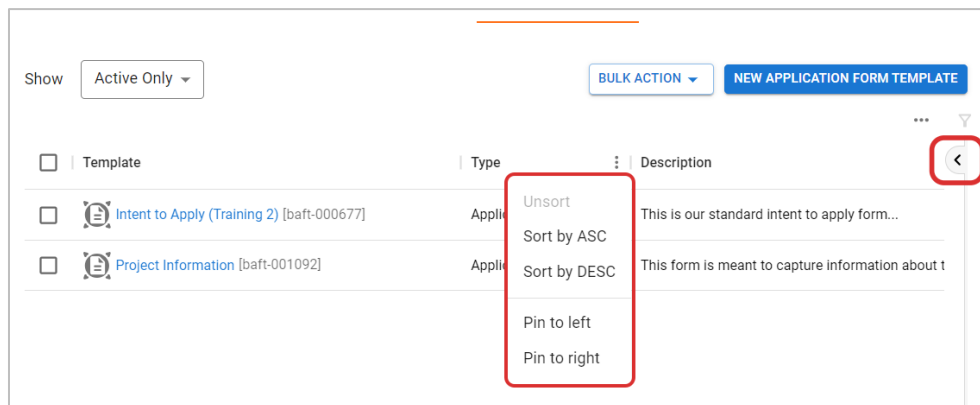
1. To archive, unarchive, or delete Templates, select the desired Templates from the table and open the Bulk Action menu button to select the desired action.



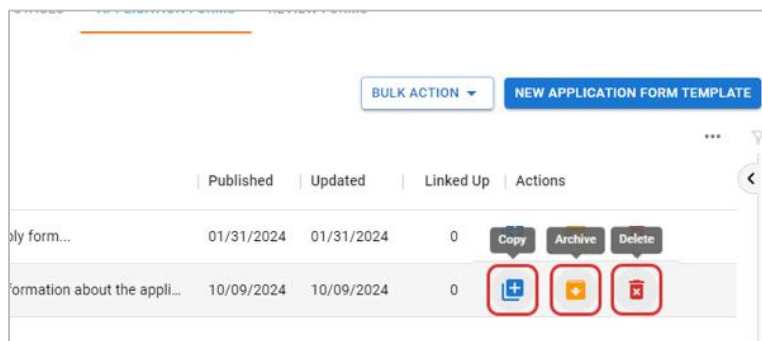
2. Click the **Show** dropdown to select which Templates will show in the table. Select **Active Only** or **Archived Only** to narrow the results.



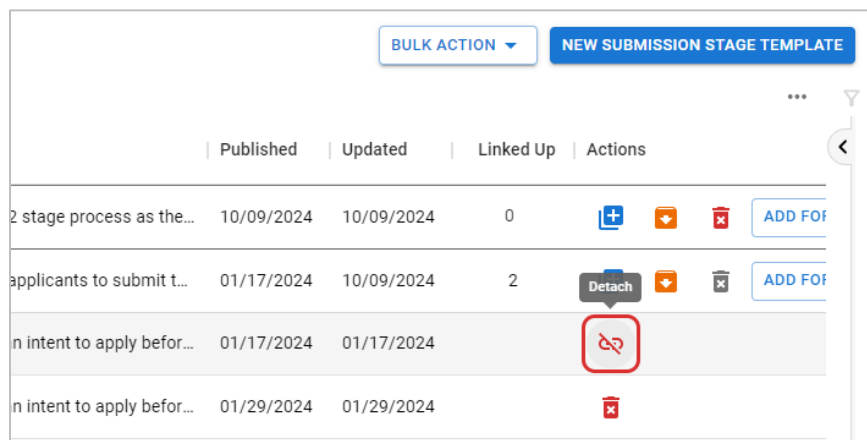
3. For further sorting and filtering, click the three vertical dots above any column or expand the right-hand filter bar by clicking the arrow on the top-right corner of the table.



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



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

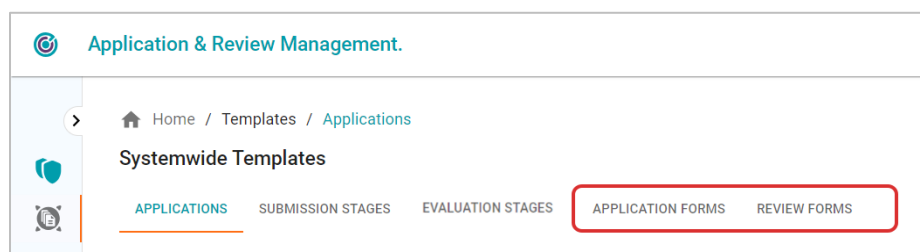


	Published	Updated	Linked Up	Actions
2 stage process as the...	10/09/2024	10/09/2024	0	+ ↓ ✕ ADD FOR
applicants to submit t...	01/17/2024	10/09/2024	2	Detach ↓ ✕ ADD FOR
n intent to apply befor...	01/17/2024	01/17/2024		✕
n intent to apply befor...	01/29/2024	01/29/2024		✕

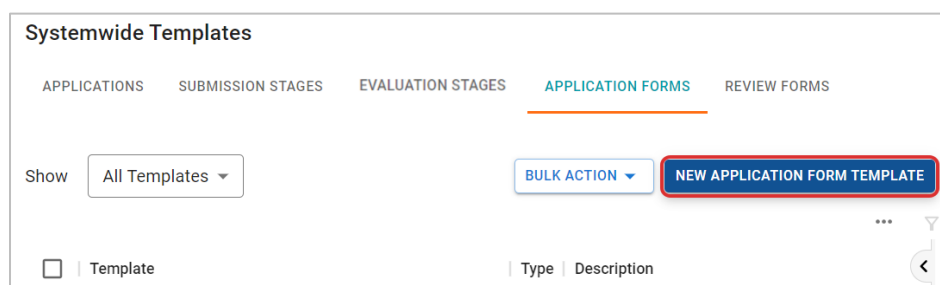
Form Templates

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.



- 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**.



Systemwide Templates

APPLICATIONS SUBMISSION STAGES EVALUATION STAGES APPLICATION FORMS **REVIEW FORMS**

Show

☐ Template

Type Description

- 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.

Application Form **Template** : Project Information / **unsaved**

SETUP FORM PREVIEW FORM USAGE

SAVE CANCEL

Form Layout

FORM META SETTINGS & INFO

Form Name ***** Form ID *****

Project Information

Template Description

This form is meant to capture information about the applicant's project

Form Instructions *****

Normal **B I U G** **≡** **≡** **≡** **≡** **≡** **≡** **≡** **≡**

Please fill all required fields and any other applicable fields. Note that the budget information will be provided in the budget worksheet.

Drag and drop form elements in this drop zone to build your form. This form is not containing business logic at this time

Dropzone

Form Elements Toolbox

LAYOUT

TYPOGRAPHY

CONTROLS

Single Line Input

Paragraph Input

Email Input

Phone Number

Number Input

Dropdown

Checkboxes

Radio Button

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”:

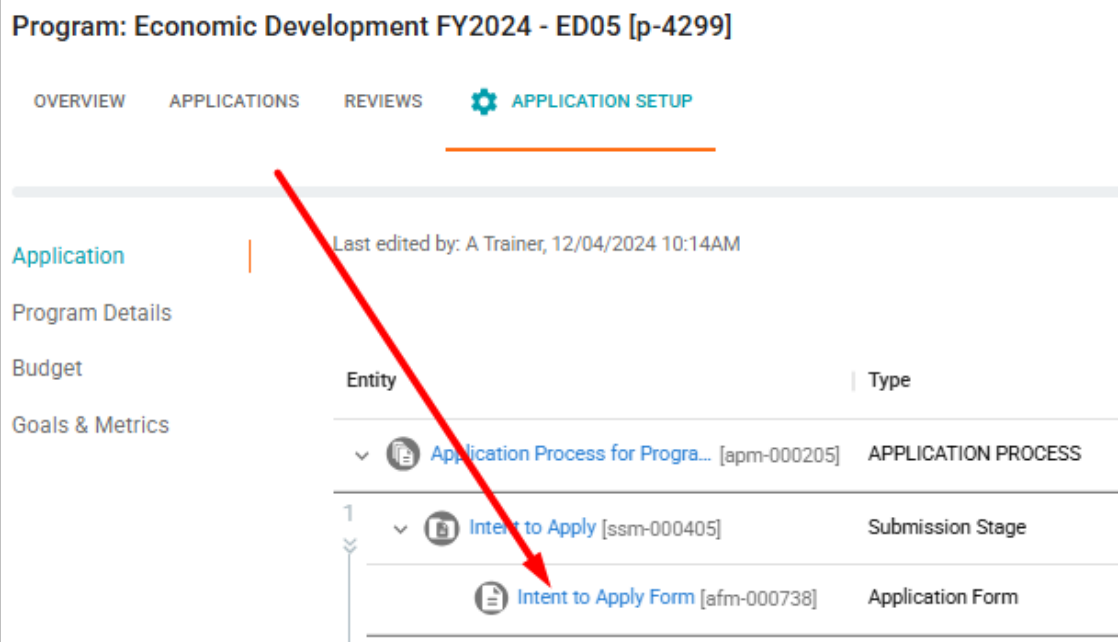
 - a. Linked: Form Templates can be linked to a Stage Template. This allows both a Stage Template and its Forms to be copied into a program all at once.
 - b. Applied: Users “apply” a Form Template to an individual Program when building out its stages and forms

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



Program: Economic Development FY2024 - ED05 [p-4299]

OVERVIEW APPLICATIONS REVIEWS **APPLICATION SETUP**

Last edited by: A Trainer, 12/04/2024 10:14AM

Application

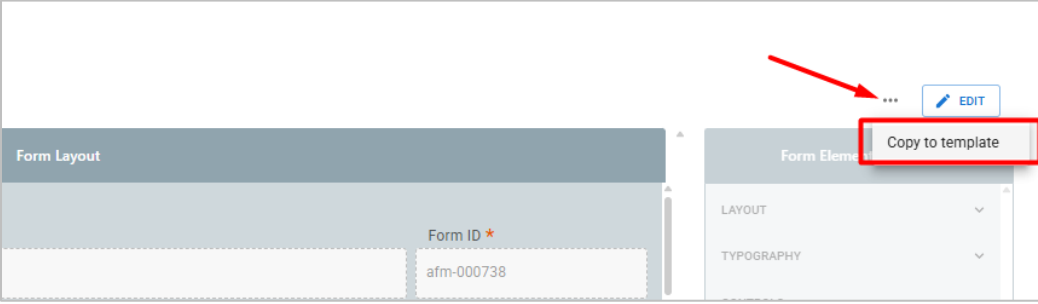
Program Details

Budget

Goals & Metrics

Entity	Type
Application Process for Progra... [apm-000205]	APPLICATION PROCESS
1 Intent to Apply [ssm-000405]	Submission Stage
Intent to Apply Form [afm-000738]	Application Form

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



Form Layout

Form ID *
afm-000738

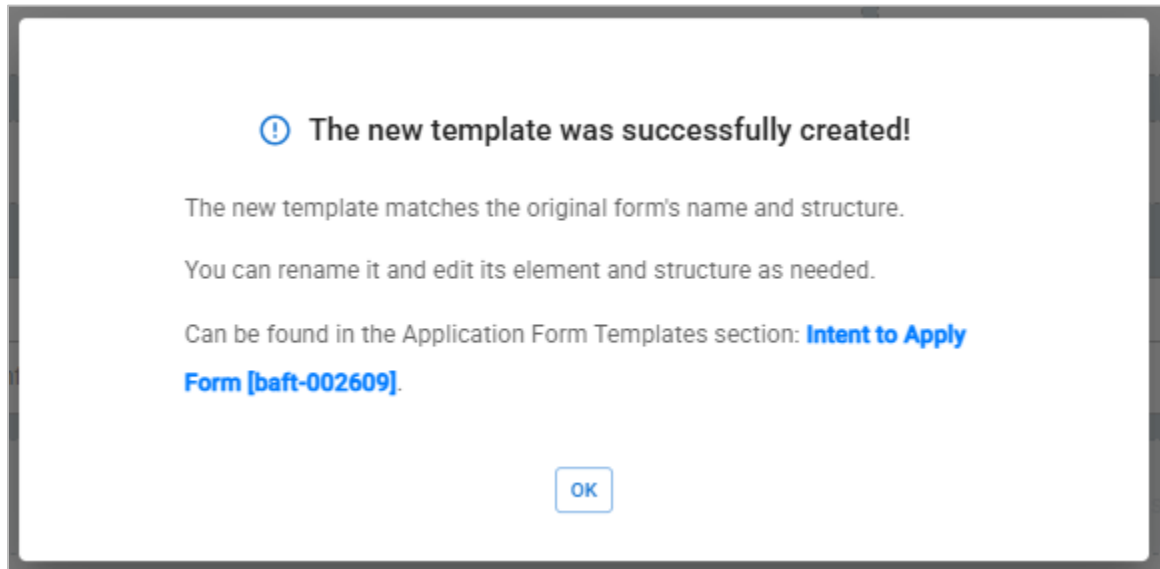
Form Elements

LAYOUT

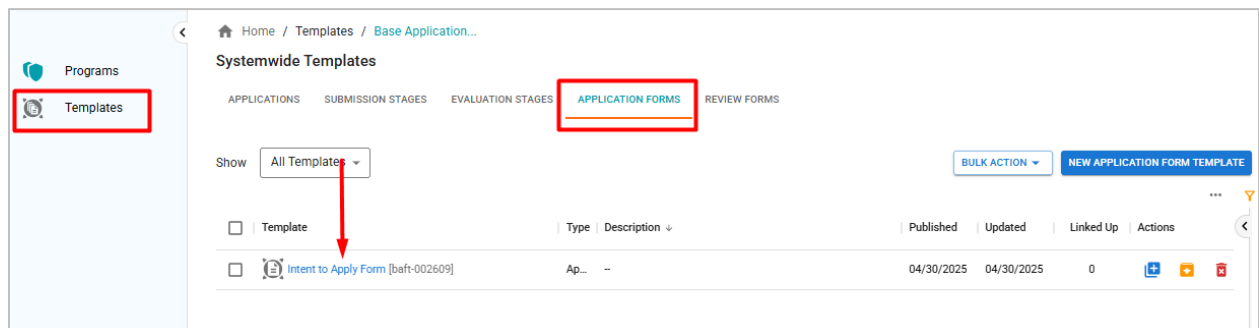
TYPOGRAPHY

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.

Template	Type	Description	Published	Updated
<input type="checkbox"/> Project Information Submission [sst-000657]	Su...	This template is used in a standard 2 stage process as the...	10/09/2024	10/09/2024
<input type="checkbox"/> Project Information [baft-001095]	Ap...	This is a standard form	10/09/2024	10/09/2024

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**.

MS REVIEW FORMS

BULK ACTION NEW SUBMISSION STAGE TEMPLATE

Description Published

This template has fdsafdsaa single form for applicants to ... 01/17/20

MS REVIEW FORMS

BULK ACTION NEW EVALUATION STAGE TEMPLATE

Description Published U

This is the standard evaluation stage for performing a revi... 10/10/2024 1

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.

Submission Stage Template : Project Information Submission [sst-000657] / **unsaved**

SETUP STAGE USAGE

Last edited by: A Trainer, 10/09/2024 12:38PM / You (EunaState1-OMAH1) editing now.

Settings

REVIEW APPLICATION PROCESS META SETTINGS & INFO

Template Name * Template ID

Project Information Submission sst-000657

Template Description

This template is used in a standard 2 stage process as the second stage

Stage Instructions *

Normal B I U G H L U T

Please fill all forms within this stage. Once submitted, we will perform a final review before responding to applicants with an award or denial notification

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.

Submission Stage Template : Intent to Apply Submission [sst-000289]

SETUP STAGE **USAGE**

Last edited by: omah user, 02/06/2024 06:08PM

Nr of Application Process Templates linked to: 2 Created by: [user]

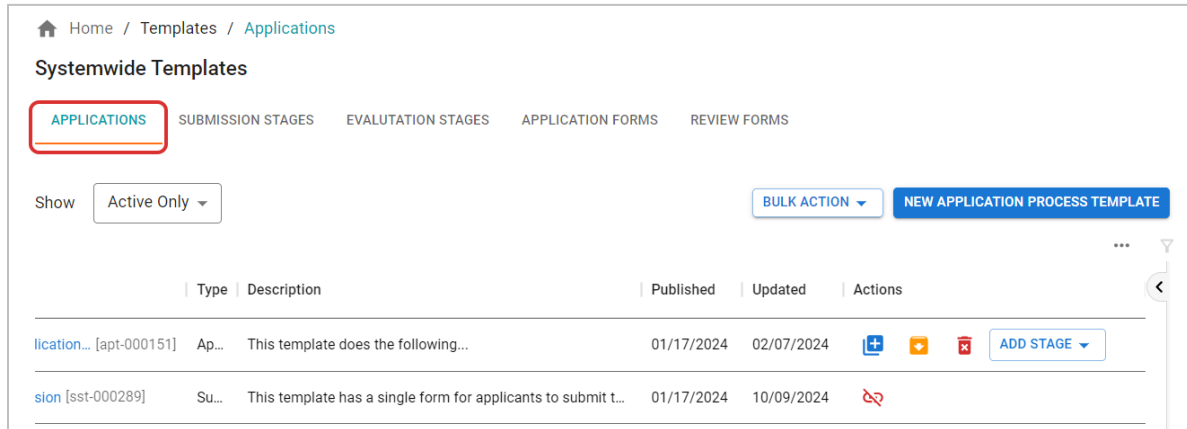
Applied in setup directly: 4 times Last Edited By: omah user

LINKED TO APPLIED TO

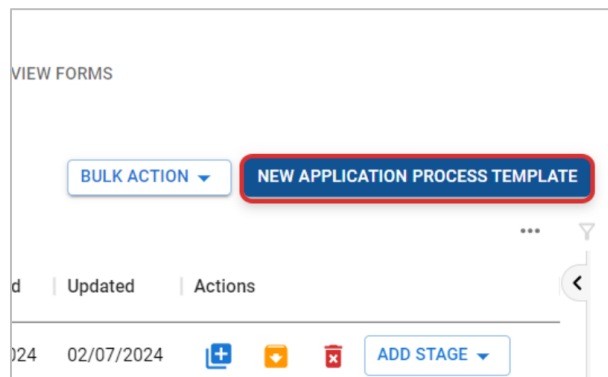
Timestamp	User	Entity	Description
01/17/2024	[user]	County Standard 2 St... [apt-000151]	This template does the following...

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.

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.

4. Equipment

		Ext Cost		Direct Cost		Ind Cost		Cost Share	
Equipment Totals:		\$0.00		\$5,000.00		\$0.00		\$0.00	
Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Item Type		
Equipment	Please enter equipment costs here	0.00	\$0.00	\$0.00	5000	AB-CD-1234	Direct Cost		

[Add Row](#)

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.

4. Equipment

		Ext Cost		Direct Cost		Ind Cost		Cost Share	
Equipment Totals:		\$0.00		\$0.00		\$0.00		\$0.00	

[+ Add Subcategory for Equipment](#)

[+ Add Table](#)

4. Equipment							
				Ext Cost	Direct Cost	Ind Cost	Cost Share
Equipment Totals:				\$0.00	\$7,580.00	\$0.00	\$0.00
Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Item Type
Protective Gear	This will include the purchase of a	0.00	\$0.00	\$0.00	\$7,580.00		Direct Cost
Add Row							

***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.

- 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.

Title	Description	Units	Unit Cost	Extended
Protective Gear	This will include the purchase of a	0.00	\$0.00	
Add Row				
Insert row above Insert row below Remove row				

- 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.

Application Budget for

Program: ATorres 3 - Economic Development FY2024
Project name:

Budget Stage: Pre-Award

Actions

\$5,000.00

Total Direct Costs

\$0.00

Total Indirect Costs

\$5,000.00

Total Amount (Direct + Indirect)

\$0.00

Match / Cost Share

\$0.00

Program Income

Indirect Costs

Not Applicable

0.00

%

Match / Cost Share

Not Applicable

0.00

%

\$

0.00

***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.

			<u>Ext Cost</u>	<u>Direct Cost</u>	<u>Ind Cost</u>	<u>Cost Share</u>		
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.

Cost	Cost	GL Code	Indirect Cost	Item Type
.00	\$78,000.00		<input checked="" type="checkbox"/>	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 %

<u>Direct Cost</u>		<u>Ind Cost</u>	<u>Cost Share</u>
\$78,000.00		\$13,260.00	\$0.00
Cost	GL Code	Indirect Cost	Item Type
\$78,000.00		<input checked="" type="checkbox"/>	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:

The screenshot shows the 'Budget Settings' form. Under the 'Match / Cost Share' section, a dropdown menu is open, showing options: 'Not Applicable' (highlighted in blue), 'Percentage', 'Itemized', and 'Total Amount'. A red box highlights the dropdown menu, and another red box highlights the 'Not Applicable' option.

- 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**.

The screenshot shows the '4. Equipment' budget section. It includes a summary table and a detailed line item table. A red arrow points from the 'Cost Share' value in the summary table to the 'Cost Share' option in the 'Item Type' dropdown of the line item table.

		Ext Cost	Direct Cost	Ind Cost	Cost Share
Equipment Totals:		\$0.00	\$0.00	\$0.00	\$14,000.00

Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Item Type
Match Cost for Equipment	This contribution will include	0.00	\$0.00	\$0.00	\$14,000.00		Cost Share

Below the table is an 'Add Row' button. To the right of the 'Item Type' dropdown, there are buttons for 'Direct Cost' and 'Cost Share' (highlighted in blue).

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

The screenshot shows the 'Budget Settings' form. Under the 'Match / Cost Share' section, the dropdown menu is set to 'Total Amount'. The 'Total Amount' value is entered as 44.87, and the 'Total Amount' value is entered as \$ 35,000.00. Red boxes highlight the 'Total Amount' dropdown, the '44.87' value, and the '\$ 35,000.00' value.

- 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.

Ext Cost		Direct Cost		Ind Cost		Cost Share
\$0.00		\$78,000.00		\$0.00		\$34,998.60
Cost	Extended Cost	Cost	GL Code	Cost Share	Item Type	
\$0.00	\$0.00	\$78,000.00		\$34,998.60	Direct Cost	

- 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.

Indirect Costs	Not Applicable	0.00	%
Match / Cost Share	Percentage	20.00	% \$ 0.00

Direct Cost		Ind Cost		Cost Share	
\$78,000.00		\$0.00		\$15,600.00	
Cost	Extended Cost	Cost	GL Code	Cost Share	Item Type
\$0.00	\$78,000.00			<input checked="" type="checkbox"/>	Direct Cost

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

Budget Narrative

Enter your budget narrative below.

This budget includes

7979 characters remaining

- 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

A screenshot of a web interface showing two buttons: 'Save Changes' (blue) and 'Discard Changes' (red). The 'Save Changes' button is highlighted with a red rectangular box. Below the buttons is a section titled 'Budget Narrative' with a text input area and a small toolbar.

A screenshot of a web interface showing the 'Budget Stage' set to 'Pre-Award'. Below this is an 'Actions' section with three icons: a floppy disk icon (highlighted with a red box), a red circle with a diagonal line, and a green Excel icon. Below the actions is a 'Budget Summary' section with some numerical data.

- 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.

A screenshot of a 'Save Budget' popup window. On the left, under 'Revisions:', there is a log entry: 'Pre-Award: Budget Created by A. Trainer on 09-13-24 10:57 AM'. On the right, under 'New Note:', there is a text input area with the text 'I made edits to the'. Below the input area, it says '981 characters remaining.'. At the bottom right, there are 'Cancel' and 'Save' buttons.