

# eCivis Portal

## Applicant User Guide

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## About eCivis Portal

For programs distributed through the eCivis Portal system, applicants have a simple and effective way to manage the entire lifecycle of their grants. Key features include:

1. Free and simple account creation
2. Detailed, yet organized program solicitation information
3. Invite other portal accounts to view/collaborate on applications and awards
4. Keep track of all your past submissions and export copies as needed
5. Accept awards, track performance, and submit reports – incorporating the same forms you filled when applying
6. Submit requests for reimbursement and track their progress
7. Request award amendments and track their progress
8. Close out grant projects in collaboration with your granting agency

The chapters that follow will walk through the application process step-by-step. If you have any questions or experience any issues along the way, it is recommended that you contact your program administrators (often listed on the “Contact” tab of the program’s solicitation):

Economic Development Support (FY2023)

Overview	Eligibility	Financial	Contact	Files
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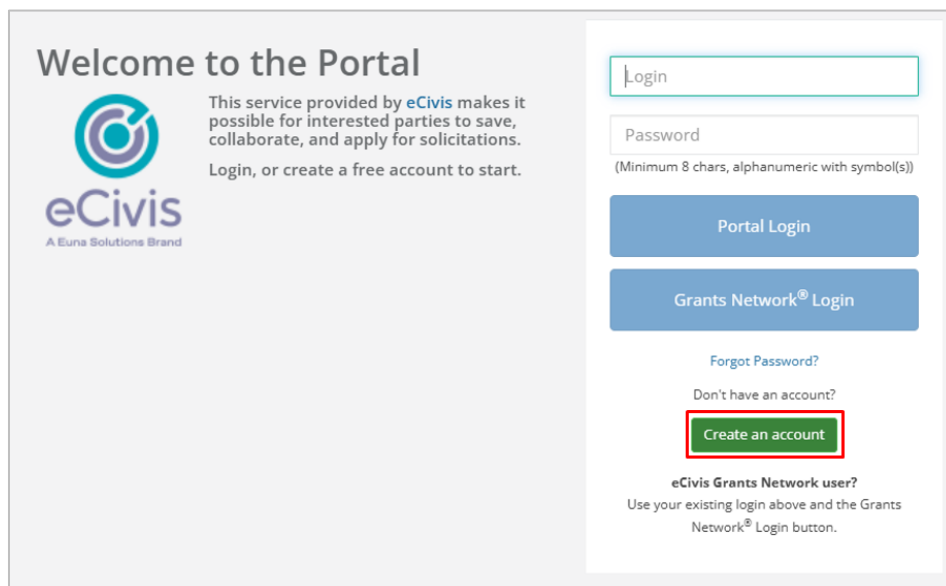
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="border-bottom: 1px dashed #ccc; padding: 5px;"><b>Agency/Department:</b></td> <td style="padding: 5px;">Administration</td> </tr> <tr> <td style="border-bottom: 1px dashed #ccc; padding: 5px;"><b>Contact/Help:</b></td> <td style="padding: 5px;"><a href="mailto:programcontact@countyofeuna.com">programcontact@countyofeuna.com</a></td> </tr> <tr> <td style="border-bottom: 1px dashed #ccc; padding: 5px;"><b>Office:</b></td> <td style="padding: 5px;">Office of SB</td> </tr> <tr> <td style="border-bottom: 1px dashed #ccc; padding: 5px;"><b>Program Contact:</b></td> <td style="padding: 5px;">123 Main St Nashville, TN 37211</td> </tr> </table>	<b>Agency/Department:</b>	Administration	<b>Contact/Help:</b>	<a href="mailto:programcontact@countyofeuna.com">programcontact@countyofeuna.com</a>	<b>Office:</b>	Office of SB	<b>Program Contact:</b>	123 Main St Nashville, TN 37211	<p><b>Contact Notes:</b></p> <hr style="border-top: 1px dashed #ccc;"/> <p>Questions should be directed to the appropriate program contact. The agency address provided is <u>for reference purposes only</u>.</p>
<b>Agency/Department:</b>	Administration								
<b>Contact/Help:</b>	<a href="mailto:programcontact@countyofeuna.com">programcontact@countyofeuna.com</a>								
<b>Office:</b>	Office of SB								
<b>Program Contact:</b>	123 Main St Nashville, TN 37211								

## Creating an Account

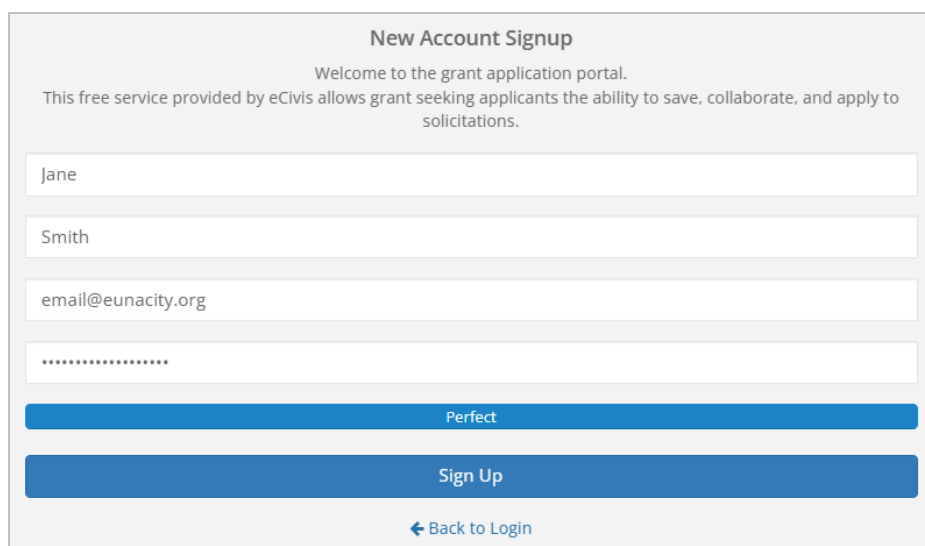
If you are applying to a program solicitation, you will need to set up a Portal account at <https://portal.ecivis.com/#/login>. (Use the “Forgot Password?” link if you have an account but need to reset your password)

**\*Note:** eCivis *Grants Network* users can use their Grants Network credentials, click Grants Network Login, and skip to the “Setting up your account profile information in ‘My Profile’” instructions below. (If you need to reset that password, visit <https://gn.ecivis.com> and click the “Forgot Login Info” link at that page)

1. Click “Create an account”

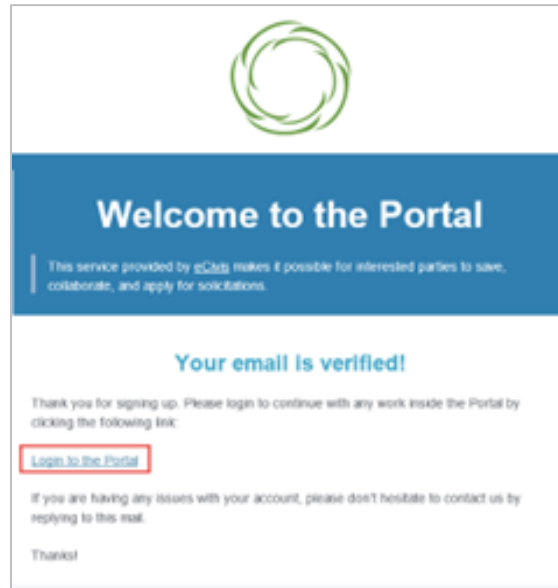


2. Enter your name, email, and desired password. Then click “Sign Up”

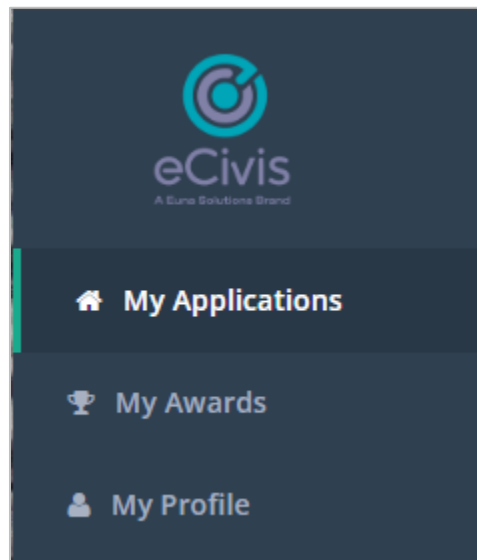


3. This will send you a confirmation email. You will need to click on the Portal link within that confirmation email to activate your account:

**\*Note:** If you do not see this email within a few minutes, check your spam/junk folder in your email inbox.

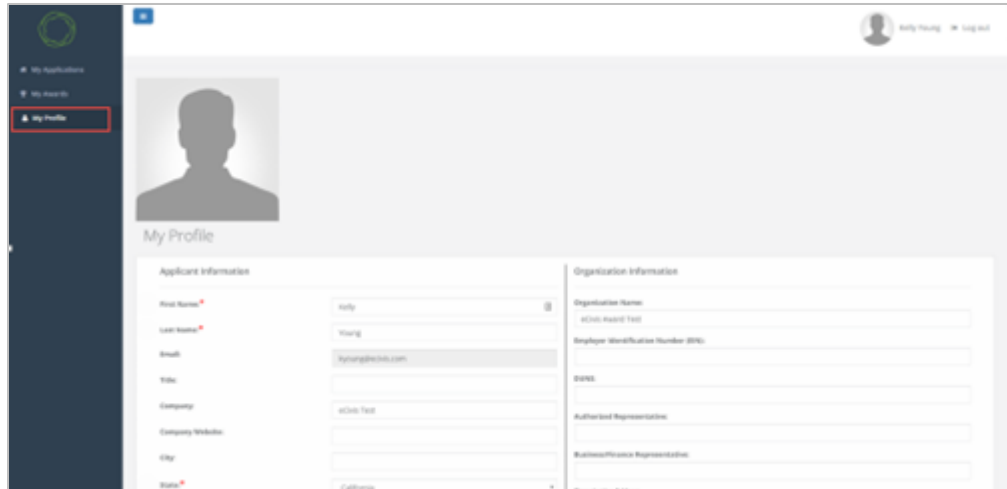


2. When you log into Portal, you will see a navigation bar on the left of your screen:

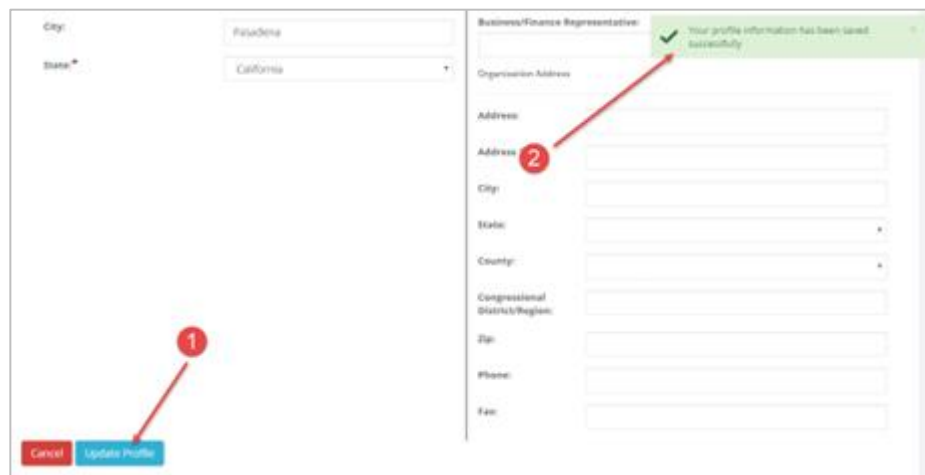


- a. My Applications: Gives you access to all applications and programs in your Portal account.
- b. My Awards: Gives you access to all the programs where you were awarded.
- c. My Profile: Gives you access to your profile information.

3. Setting up your account profile information in “My Profile”
  - a. Ensure that the required fields within the “My Profile” section are complete before continuing on to any applications.



- b. Then, click on the “Update Profile” button on the bottom of the screen
    - c. A green success message should appear in the top right corner of your screen:



3. If you ever need to edit your profile, you can do so by clicking “My Profile” in the left-side navigation bar within Portal.

## Reviewing the Program Solicitation

The Program Solicitation provides important information to anticipate the work required in applying for and, if awarded, managing an award from this program. You will also find any necessary file downloads or helpful information to determine if your organization and project are eligible.

### State of EUNA 1

Economic Development FY2024 - ED04

Overview Eligibility Financial Contact Files

ID:	ED-2345-6789	<b>Summary:</b>  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.
Title:	Economic Development FY2024 - ED04	
Application Start Date:	04/01/2024	
Application End Date:	07/31/2024	
CFDA/ALN:	12.345	
Reference URL:	<a href="https://eunasolutions.com/">https://eunasolutions.com/</a>	

\* eCivis Inc. is not responsible or liable for user-generated content.

## Starting a New Application

1. Click the “Apply” button on the program’s Solicitation page to begin the application process in eCivis Portal.

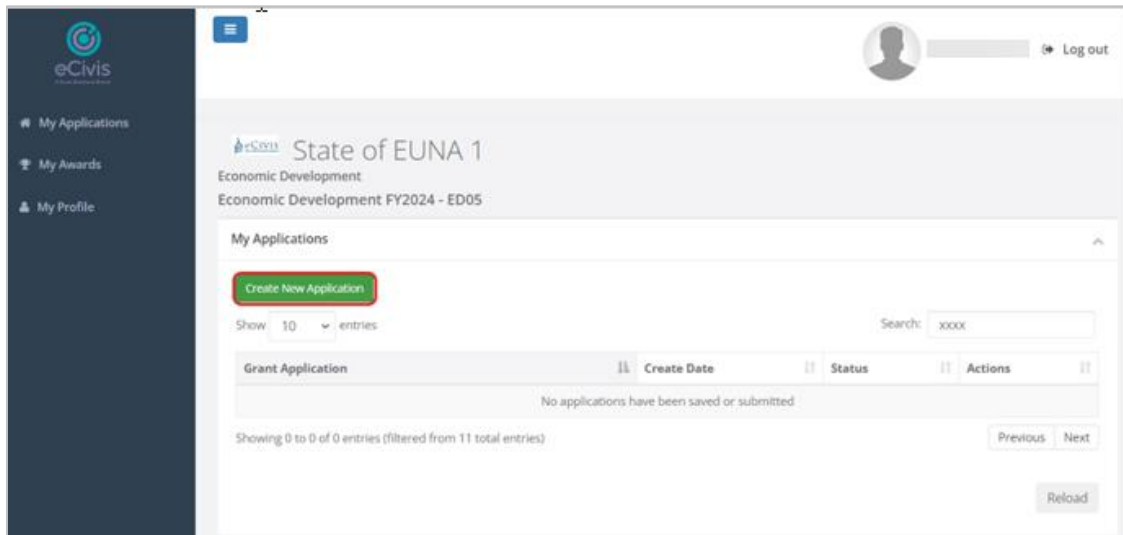
### State of EUNA 1

Economic Development FY2024 - ED05

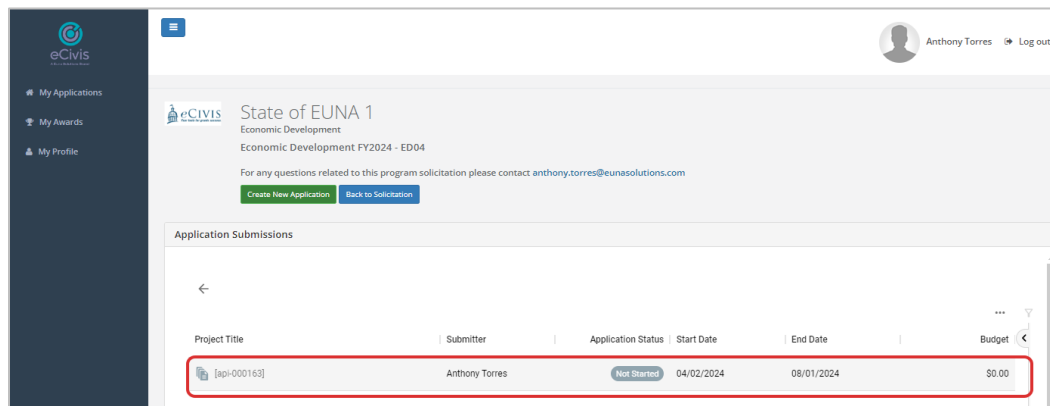
Overview Eligibility Financial Contact Files

2. Log into your Portal account using the instructions from the “Creating an Account” chapter above

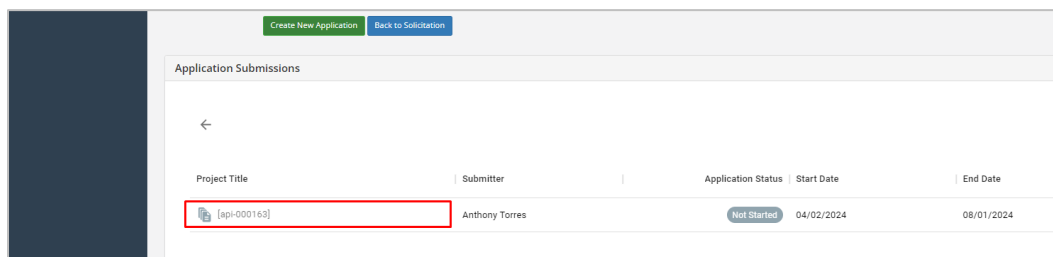
3. Click “Create New Application”



4. The new application will appear in the Application Submissions table.  
 \*Note: If the program allows multiple application submissions from the same applicant, this table will list any other application submissions you create toward this Program.



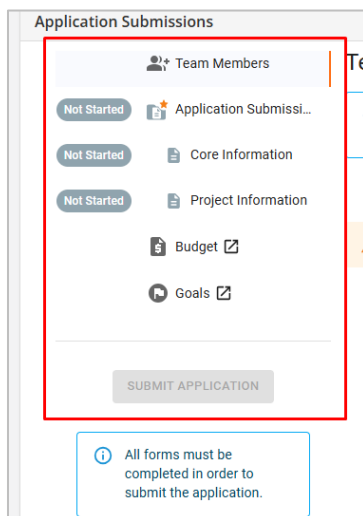
5. Click on the newly added Project Title (labeled with a unique code beginning with “api-“)



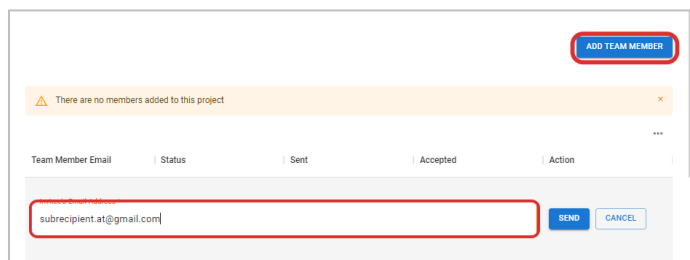


## Completing and Submitting an Application

Use the following components in the left-hand panel to manage and submit your application:

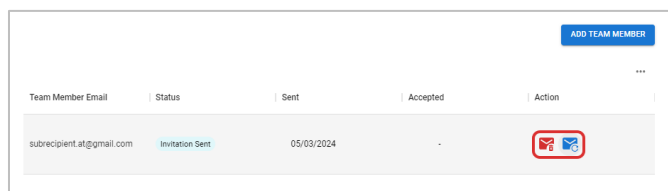


1. **Team Members:** Add Team members if you would like to invite other individuals to collaborate on this application.
  - a. Click “Add Team Member”



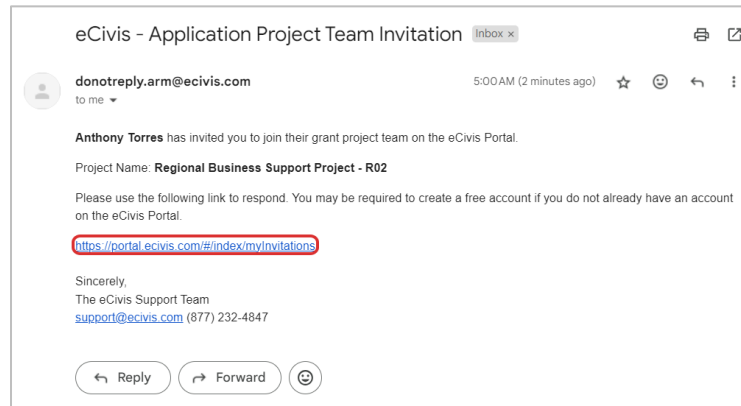
- b. Enter the invitee’s Email Address and click “Send”
- c. Project Team Members invitations will be sent and be listed in the status as “Invitation Sent”.

**\*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.

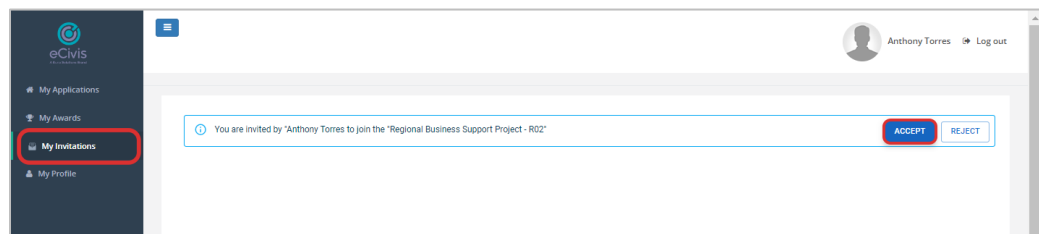



- d. The invitee will receive an email to access eCivis Portal and accept the invitation.

**\*Note:** The invitee may set up a Portal account at this link if they have not already done so

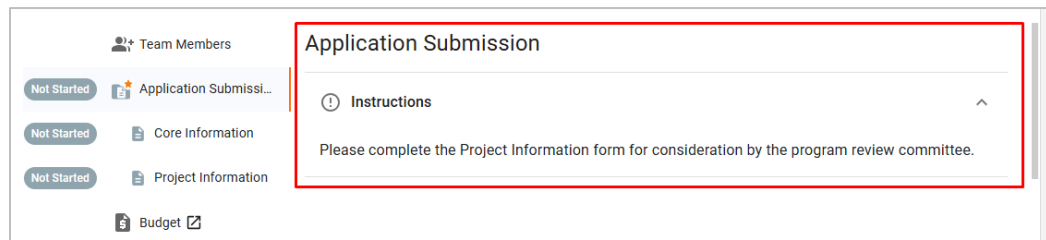


- e. In Portal, they will click My Invitations from the navigation bar and click Accept or Reject on this invite.



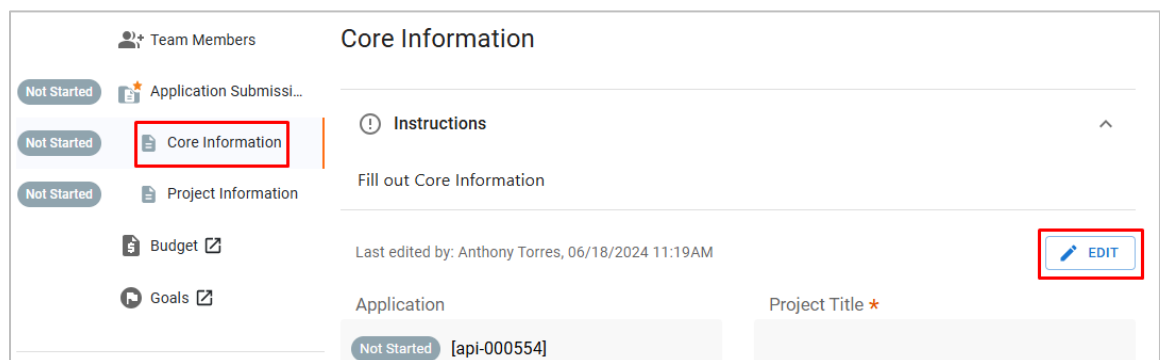
2. **Submission Stage:** The starred folder icon  indicates the current Submission Stage to be completed

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

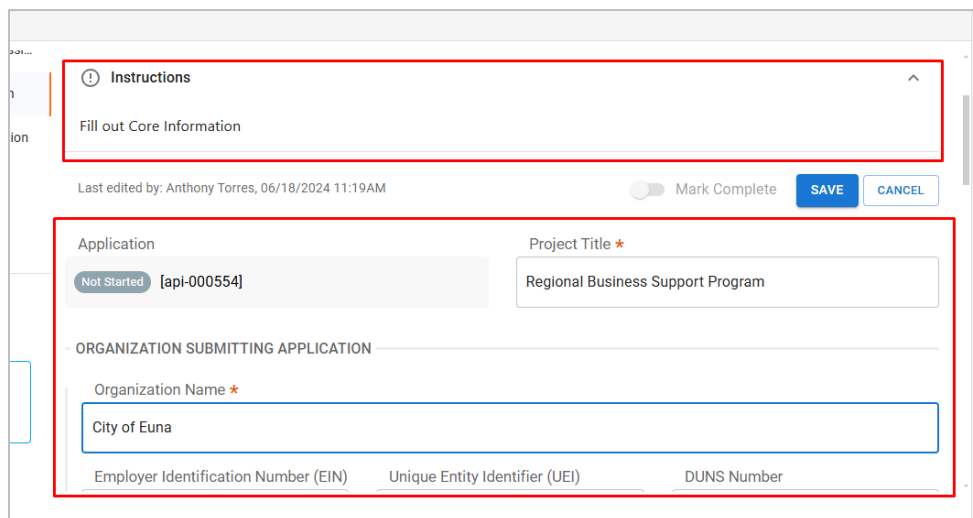


3. **Application Forms:** Open and edit each form until complete

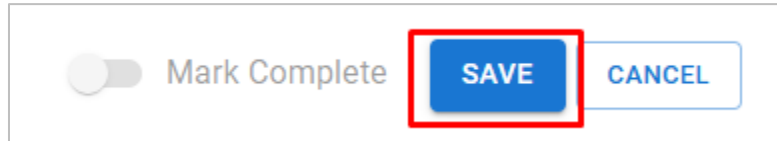
a. Select the form from the left-hand panel and click Edit



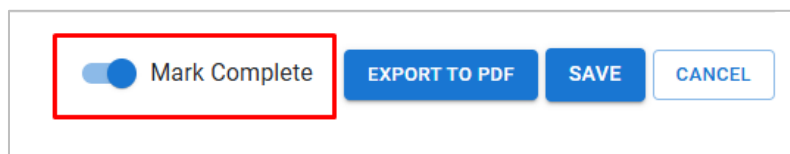
b. Expand the Instructions section to review important details provided by the Grantor before continuing to fill the form.



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

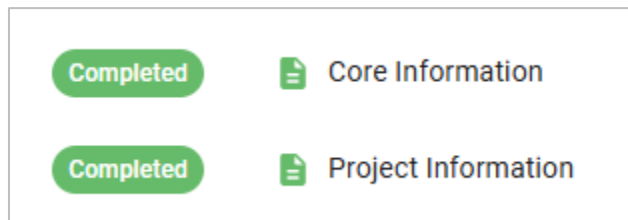


- d. Click “Mark Complete” when you have finalized all edits. Toggle this field back to the “off” position if you need to make further edits before submitting.

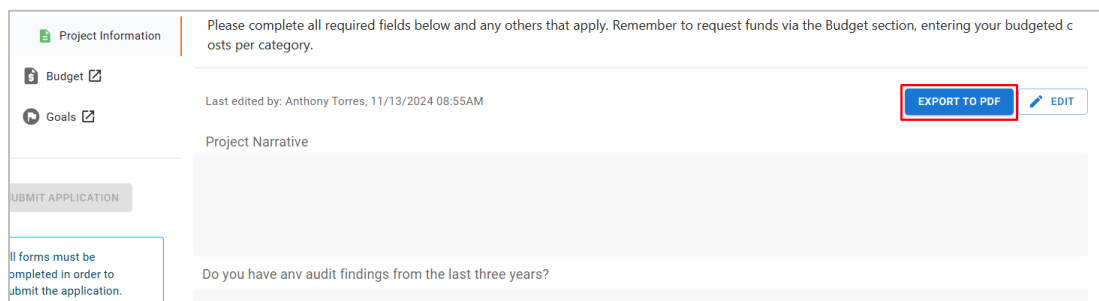


- e. Any forms you mark complete will update to the green “Completed” status

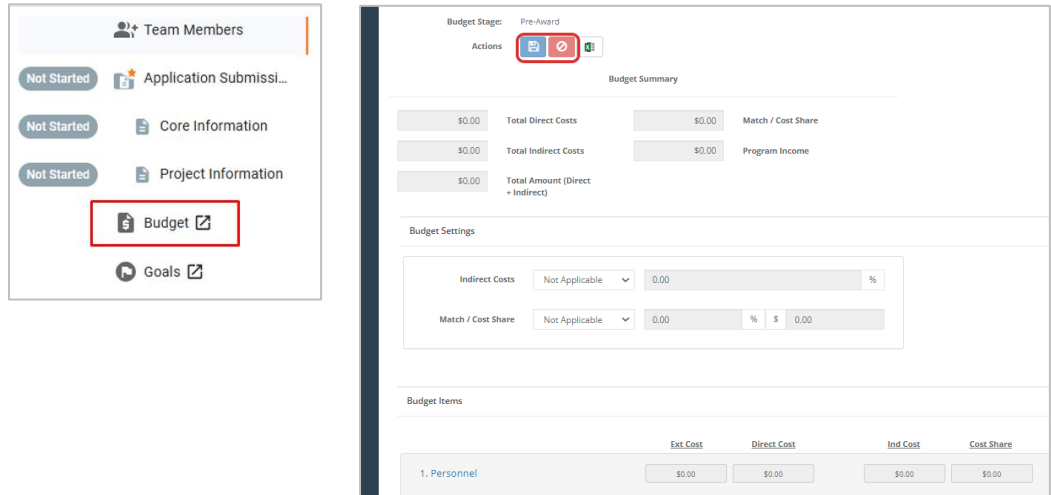
**\*Note:** All included application forms must be marked complete and, if it is included, the Budget Worksheet must have a requested total amount before you can click the “Submit Application” button. Continue to the next section for those instructions.



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



4. **Budget:** Fill the Budget Worksheet to propose an award amount and to itemize budgeted costs as needed. This same format will be incorporated into your award acceptance, financial reporting, and reimbursement requests, if awarded.
  - a. Click “Budget” from the left-hand bar. The Budget Worksheet will open in a separate browser tab.



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

For budget worksheets with a pre-configured tables and line items, simply enter the costs into the “Cost” column.

4. Equipment

		Ext Cost	Direct Cost	Ind Cost	Cost Share		
<b>Equipment Totals:</b>		\$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.

- c. 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

- d. Budget Settings: Expand 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 amounts separated in the Budget Summary section at the top of the worksheet.

Application Budget for Anthony Torres  
 Program: ATorres 3 - Economic Development FY2024  
 Project name:

Budget Stage: Pre-Award

Actions:   


**Budget Summary**

\$5,000.00	Total Direct Costs	\$0.00	Match / Cost Share
\$0.00	Total Indirect Costs	\$0.00	Program Income
\$5,000.00	Total Amount (Direct + Indirect)		

**Budget Settings**

Indirect Costs: Not Applicable | 0.00 %

Match / Cost Share: Not Applicable | 0.00 % \$ 0.00



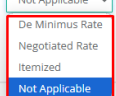
- i. Indirect Cost – Methods for entering Indirect Cost include:

**Budget Settings**

Indirect Costs: Not Applicable | 0.00 %

Match / Cost Share: **De Minimus Rate** | 0.00 % \$ 0.00

Other options: Negotiated Rate, Itemized, Not Applicable

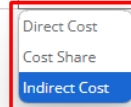


1. Not Applicable (Default Setting) – List all indirect costs as line items and update the “Item Type” on those line items to “Indirect Cost”

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

[Add Row](#)

Item Type dropdown options: Direct Cost, Cost Share, **Indirect Cost**



- Itemized – Include an indirect cost value next to the Cost of any line item

1. Personnel

		Ext Cost	Direct Cost	Ind Cost	Cost Share			
Personnel Totals:		\$5,000.00	\$7,500.00	\$750.00	\$0.00			
Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Indirect Cost	Cost Share
FTEs	Full Time Employees	1	\$5,000.00	\$5,000.00	\$5,000.00		\$500.00	\$0.00
PTEs	Part Time Employees	0	\$0.00	\$0.00	\$2,500.00		\$250.00	\$0.00

[Add Row](#)

- De Minimus Rate – Calculates the federal De Minimus indirect cost rate against each budget line where you select the Indirect Cost checkbox

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

- Negotiated Rate – Calculates the manually entered indirect cost rate against each budget line where you select the Indirect Cost checkbox

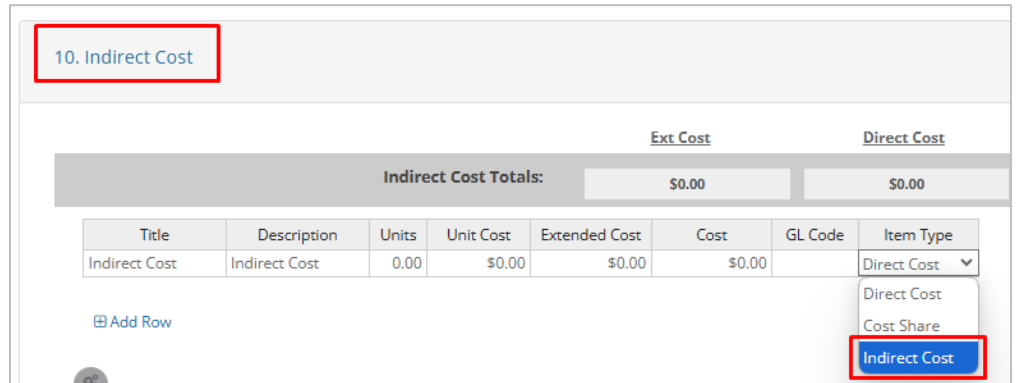
Indirect Costs: Negotiated Rate  %

Direct Cost	Ind Cost	Cost Share
\$78,000.00	\$13,260.00	\$0.00

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



**\*Note:** Some budget worksheets may include a separate budget category dedicated to tracking Indirect Costs. Changing the rows' item types within this category to "Indirect Cost" will allow you to separate Direct Cost and Indirect Cost Totals at the top of the budget worksheet

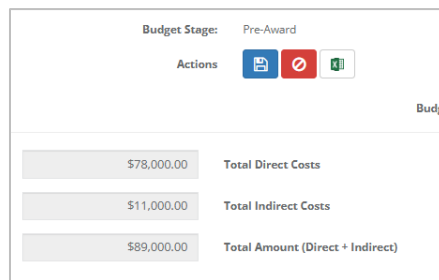


10. Indirect Cost

				Ext Cost	Direct Cost
<b>Indirect Cost Totals:</b>				\$0.00	\$0.00

Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Item Type
Indirect Cost	Indirect Cost	0.00	\$0.00	\$0.00	\$0.00		Direct Cost

Item Type dropdown: Direct Cost, Cost Share, Indirect Cost

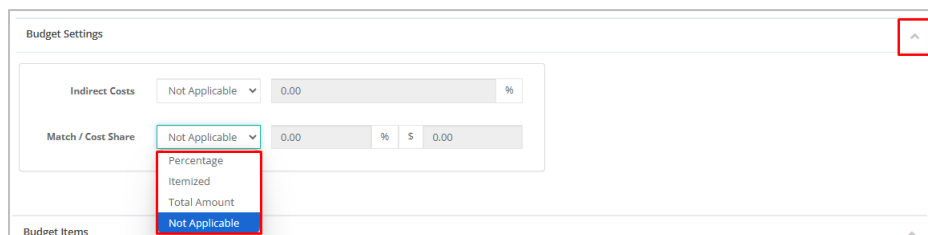


Budget Stage: Pre-Award

Actions: [Print] [Refresh] [Export]

\$78,000.00	Total Direct Costs
\$11,000.00	Total Indirect Costs
\$89,000.00	Total Amount (Direct + Indirect)

ii. Match/Cost Share – Methods for entering Match/Cost Share include:



Budget Settings

Indirect Costs: Not Applicable, 0.00 %

Match / Cost Share: Not Applicable, 0.00 % \$ 0.00

Match / Cost Share dropdown: Percentage, Itemized, Total Amount, Not Applicable

1. Not Applicable (Default Setting) – List all match costs as line items and update the "Item Type" on those line items to "Cost Share"

Extended Cost	Cost	GL Code	Item Type
\$0.00	\$78,000.00		Direct Cost

Item Type dropdown: Direct Cost, Cost Share, Indirect Cost

- Total Amount – Enter a total match/cost share amount at the top of the Budget Worksheet

**Budget Settings**

Indirect Costs: Not Applicable (dropdown), 0.00 (%)

Match / Cost Share: Total Amount (dropdown), 44.87 (%), \$ 35,000.00

- Itemized – Include a match/cost share value next to the Direct Cost of any line item

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		

- Percentage – Calculates the manually entered percentage against each budget line where you select the Cost Share checkbox

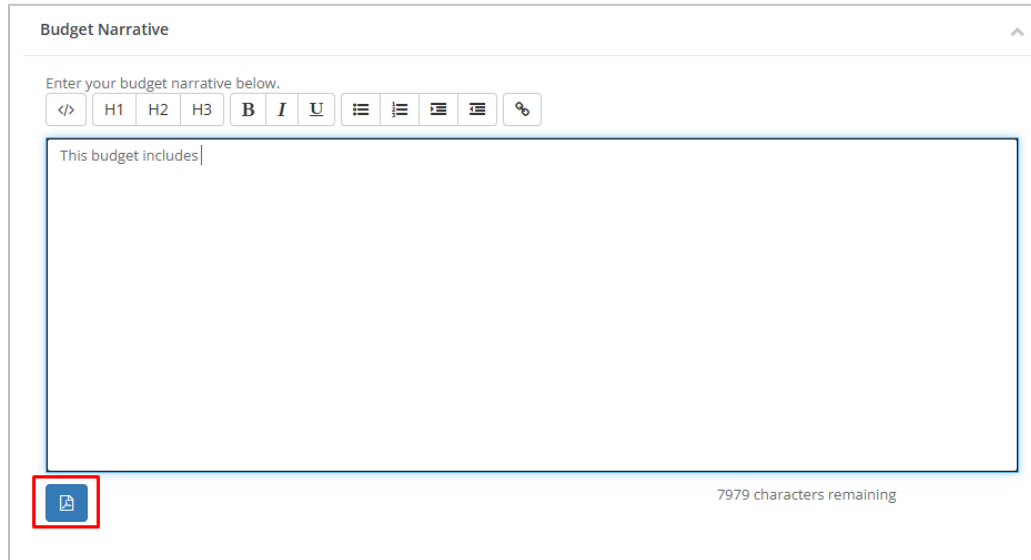
**Budget Settings**

Indirect Costs: Not Applicable (dropdown), 0.00 (%)

Match / Cost Share: Percentage (dropdown), 20.00 (%), \$ 0.00

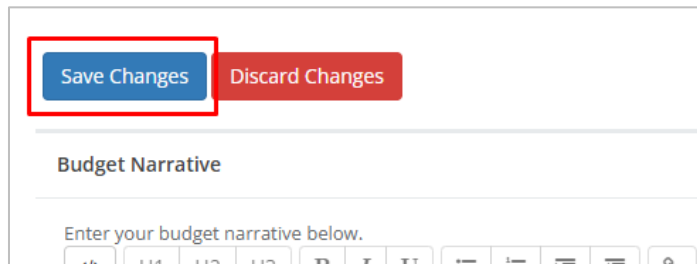
Direct Cost		Ind Cost		Cost Share		
\$78,000.00		\$0.00		\$15,600.00		
Cost	Extended Cost	GL Code	Cost Share	Item Type		
\$0.00	\$78,000.00		<input checked="" type="checkbox"/>	Direct Cost		

- e. Budget Narrative (Optional): Unless directed to provide this information elsewhere, you may provide a detailed justification for your proposed budget here. This can also be exported to PDF for your records

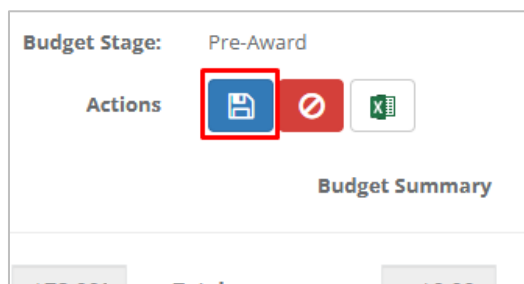


The screenshot shows a web form titled "Budget Narrative". At the top, it says "Enter your budget narrative below." followed by a rich text editor toolbar with icons for undo, redo, H1, H2, H3, bold, italic, underline, bulleted list, numbered list, link, unlink, and link icon. Below the toolbar is a large text area containing the text "This budget includes|". At the bottom left of the text area is a floppy disk icon, which is highlighted with a red box. At the bottom right, it says "7979 characters remaining".

- f. 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

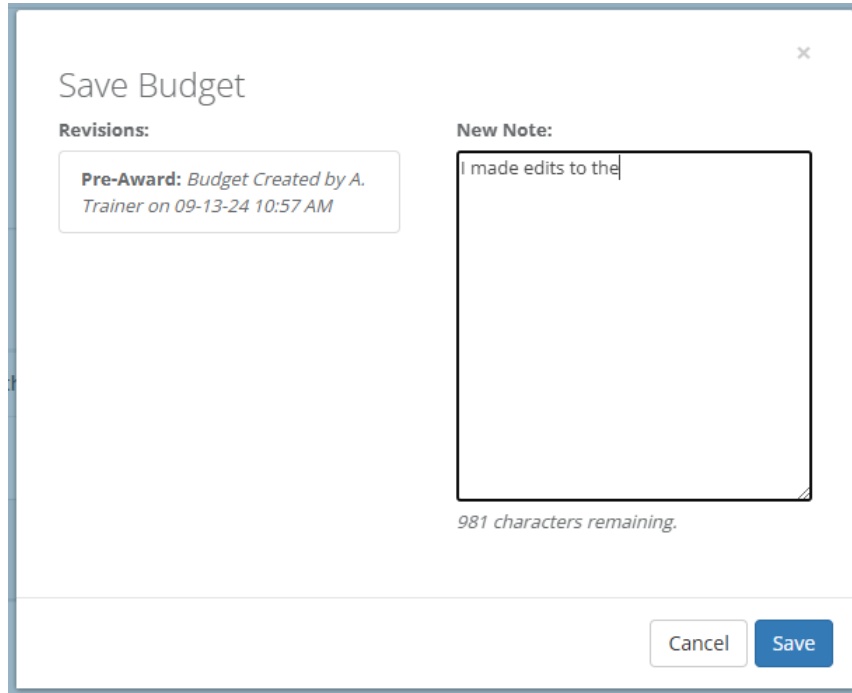


The screenshot shows two buttons: "Save Changes" (blue) and "Discard Changes" (red). The "Save Changes" button is highlighted with a red box. Below the buttons is a section titled "Budget Narrative" with the text "Enter your budget narrative below." and a rich text editor toolbar.



The screenshot shows a section titled "Budget Stage: Pre-Award". Below it is an "Actions" section with three icons: a floppy disk icon (highlighted with a red box), a red circle with a slash, and a green Excel icon. Below the actions is a "Budget Summary" section with a table showing values like "\$78,000" and "\$0.00".

- g. 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 your applicant team members and the granting agency reviewing this budget.



Save Budget

**Revisions:**

**Pre-Award:** Budget Created by A.  
Trainer on 09-13-24 10:57 AM

**New Note:**

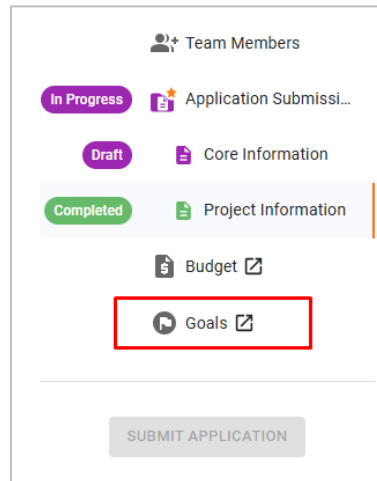
I made edits to the

981 characters remaining.

Cancel Save

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

5. **Goals:** If included, fill the Goals Worksheet to propose project goals. This same form will be used later, if awarded, to document the final goal target amounts and to report progress against those goals.
  - a. Click “Goals” from the left-hand bar. The Budget Worksheet will open in a separate browser tab.



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

**\*Note:** The expenditure fields are not used during application but may be used when submitting Activity Reports if you are awarded.

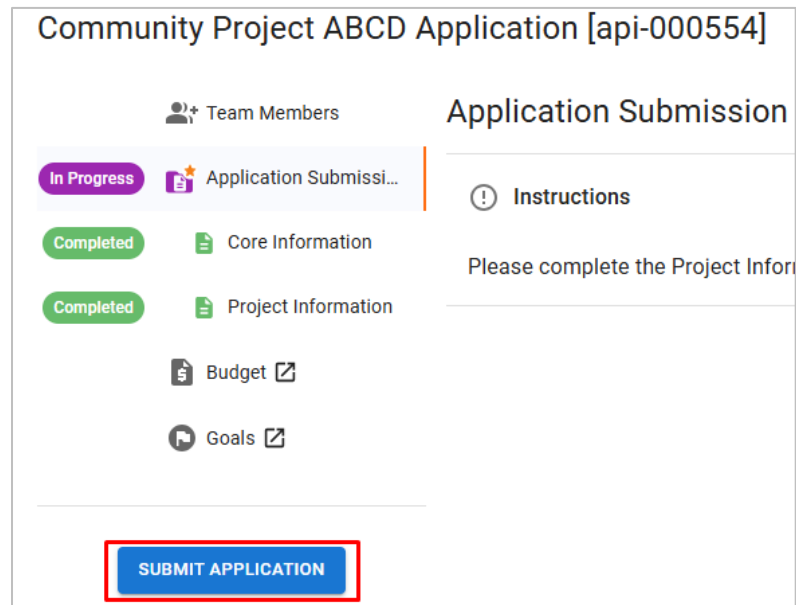
Application Goals for City of EUNA  
 Program: Economic Development FY2024 - ED  
 Project name: Regional Business Support Project

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](#)

- c. When finished editing, click Save Goals
  - d. Close the browser tab containing the goals and return to the previous tab containing the application

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

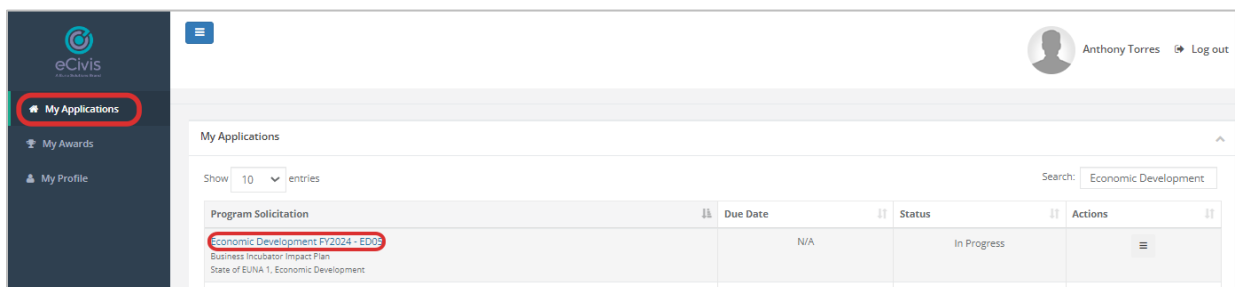


7. Once submitted, the Grantor will typically allow assigned Review Committee members to access select portions of your application content.

## Tracking Current & Submitted Applications

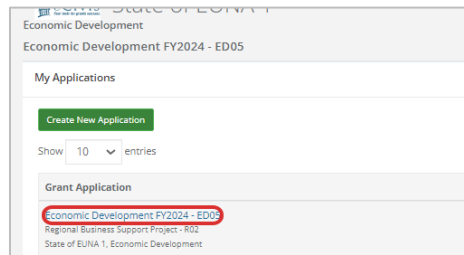
To view and monitor your open or previously submitted applications, follow the steps below:

1. Click “My Applications” from the left-hand navigation bar. Then, use the top-right search bar or sort the headings of this table to find your application.

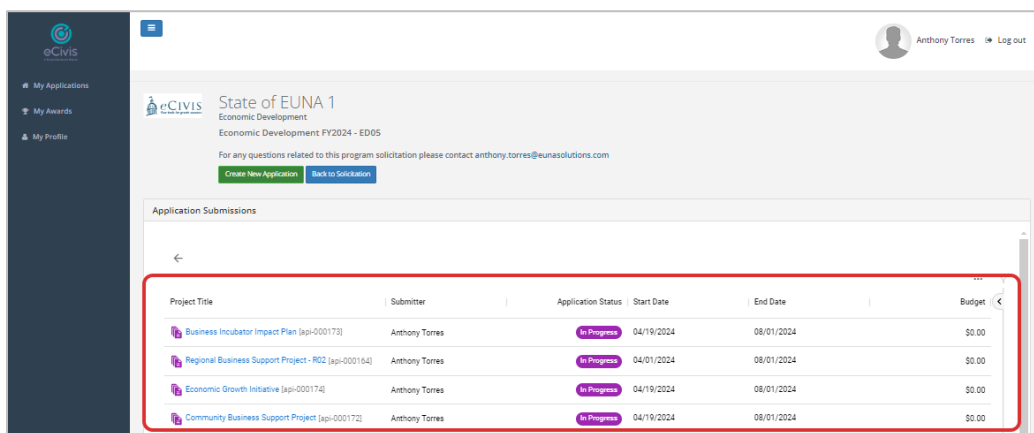


2. You will be taken to a table of all applications you’ve created for this Program (ability to submit multiple applications is only available at Grantor discretion and may be deactivated)

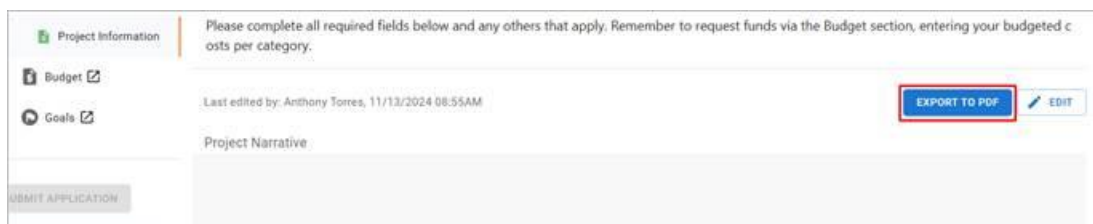
- Click any of the linked application titles in this table to access the Application Submissions window.



- The Applications Submissions window contains a more detailed table of your applications. Click the applicable Project Title to review that application.



- To export a copy of the filled application form to PDF format, open the form name and click “Export to PDF” from the top-right corner of the page



- To export a copy of the budget worksheet, open the “Budget” menu item and click the spreadsheet button at the top of the worksheet

