

# 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 S	Support (FY202	23)		
Overview	Eligibility	Financial	Contact	Files	
Agency/De	epartment:	Administratio	n		Contact Notes:
Contact/Help: Office: Program Contact:		programcontact@countyofeuna.com			Questions should be directed to the appropriate program c
		Office of SB 123 Main St Nashville, TN 37211			The agency address provided is <u>for reference purposes on</u>



#### **Creating an Account**

If you are applying to a program solicitation, you will need to set up a Portal account at <a href="https://portal.ecivis.com/#/login">https://portal.ecivis.com/#/login</a>. (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 <u>https://gn.ecivis.com</u> 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"

New Account Signup					
Welcome to the grant application portal. This free service provided by eCivis allows grant seeking applicants the ability to save, collaborate, and apply to solicitations.					
Jane					
Smith					
email@eunacity.org					
Perfect					
Sign Up					
🗲 Back to Login					



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.

0				() strong a second	
· · · · · · · · · · · · · · · · · · ·					
<ul> <li>No Asset</li> <li>No Frank</li> </ul>	My Profile				
	Applicant information			Organization Information	
	First Ranks*	any .	8	Deganization Names	1
	Last Roma <sup>®</sup>	Young		eCon Padry Terr	
	and .	Rytong/Incluio.com		and being an an end of the second secon	
	104			01911	
	Company	ethis feat		A disclot becautoise	
	Company Website.			Automation Ingenerations	
	Oy			Rutimes/Firance Representative	
	Tara.*	Gébria		Remarkation Distance	

- 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:

City:	Paladeta	Business/Finance Representative
Date.*	California	* Operander Addres
		Address
		Address 2
		Dig
		tote .
		County A
		Compressional District/Region:
	0	Tap.
	/	Place
/		Fae

3. If you ever need to edit your profile, you can do so by clicking "My Profile" in the leftside 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 EUN	State of EUNA 1								
Economic Development	FY2024 - E004								
✓ Apply									
Overview Eligibility	Financial Contact Files								
	ED-2345-6789	Summary:							
Title:	Economic Development FY2024 - ED04	Economic Development FY2024 - ED04 will provide small businesses with funding to							
Application Start Date:	04/01/2024	support economic growth in Euna City through business coaching, training programs, and informational resources.							
Application End Date:	07/31/2024								
CFDA/ALN:	12.345								
Reference URL:	https://eunasolutions.com/								
		1							
	* 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	State of EUNA 1							
Economic D	Economic Development FY2024 - ED05							
🗸 Apply	Apply							
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"

eCivis							🕒 Log out
<ul> <li>My Applications</li> <li>My Awards</li> <li>My Profile</li> </ul>	Economic Development Economic Development FY2024 - ED05						
	My Applications Create New Application Show 10 v entries			Search:	2008	x	~
	Grant Application	11. Create Date		Status		Actions	
		to applications have been saved or sub	mitted				
	Showing 0 to 0 of 0 entries (filtered from 11 total entries)					Previ	ous Next Reload

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.

<b>O</b> eCivis								Anthony Torres	🗭 Log out
<ul> <li>My Applications</li> <li>My Awards</li> <li>My Profile</li> </ul>	<u>à eCIVIS</u>	State of EUNA 1 Economic Development Economic Development FY2024 - ED04 For any questions related to this program so Create New Application Rest to Solicitation	licitation please contact ar	nthony.to	rres@eunasolutions.c	zom			
	Application ← Project	1 Submissions	Submitter		Application Status	Start Date	End Date	 Budg	• 🔻
	👔 [ap	⊦000163]	Anthony Torres		Not Started	04/02/2024	08/01/2024	\$0.0	10

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

	Create New Application Back to Sc	vlicitation				
A	pplication Submissions					
	← Project Title	Submitter	Application Status   5	Start Date	End	Date
	[api-000163]	Anthony Torres	Not Started	04/02/2024	08/0	01/2024
	-					



## 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"

			ADD TEAM MEMBER
$\underline{\wedge}$ There are no members added to this project			×
Team Member Email Status	Sent	Accepted	Action
subrecipient.at@gmail.com			SEND CANCEL

- 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.

				ADD TEAM MEMBER
Team Member Email	Ctatus	Sent	Accepted	
Team Member Email	Status	sent	Accepted	Action
subrecipient.at@gmail.com	Invitation Sent	05/03/2024		



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

eCivis - Application Project Team Invitation	Inbox ×			æ	ø
donotreply.arm@ecivis.com to me ◄	5:00 AM (2 minutes ago)	☆	٩	¢	:
Anthony Torres has invited you to join their grant project team on the eCi	vis Portal.				
Project Name: Regional Business Support Project - R02					
Please use the following link to respond. You may be required to create a on the eCivis Portal.	free account if you do no	t already	have a	in acco	unt
https://portal.ecivis.com/#/index/mylnvitations					
Sincerely,					
The eCivis Support Team support@ecivis.com (877) 232-4847					
( Reply ( Forward )					

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

* Team Members	Application Submission	
Not Started 📑 Application Submissi	() Instructions	
Not Started Core Information	Please complete the Project Information form for consideration by the program review committee.	
Not Started Project Information		J
🕏 Budget 🔀		

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

	2+ Team Members	Core Information		
Not Started Not Started Not Started	Application Submissi Core Information Project Information	① Instructions Fill out Core Information		^
	Budget 🗹	Last edited by: Anthony Torres, 06/18/2024 11:19AM		EDIT
		Application Not Started [api-000554]	Project Title <b>*</b>	

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

() Instructions	^
Fill out Core Information	
Last edited by: Anthony Torres, 06/18/2024 11:19AM	Mark Complete SAVE CANCEL
Application	Project Title *
Not Started [api-000554]	Regional Business Support Program
ORGANIZATION SUBMITTING APPLICATION	
Organization Name *	
City of Euna	
Free laws I don't for the Align has (FIN)	



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.

Mark Complete	EXPORT TO PDF	SAVE	CANCEL

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

Project Information	Please complete all required fields below and any others that apply. Remember to request funds via the Budget section, entering your budgete osts per category.	ed c
🕏 Budget 🗹		
🕞 Goals 🗹	Last edited by: Anthony Torres, 11/13/2024 08:55AM	EDIT
	Project Narrative	
UBMIT APPLICATION		
Il forms must be ompleted in order to ubmit the application.	Do you have anv audit findings from the last three years?	



- 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.

	At Team Members		Budget Stag Action	e: Pre-Award			
Not Started	Application Submissi			B	udget Summary		
Not Started	Core Information		\$0.00	Total Direct Costs	\$0.00	Match / Cost Share	
Not Started	Project Information	1.5	\$0.00 \$0.00	Total Indirect Costs	\$0.00	Program Income	
Г	🕯 Budget 🔀	Budį	get Settings	+ indirect)			
	Goals 🖸		Indirect	Costs Not Applicable	✔ 0.00		96
			Match / Cost S	Share Not Applicable	♥ 0.00	% \$ 0.00	
		Budg	et Items				
			Personnel		Ext Cost	Direct Cost	Ind Cost Cost Share
		1.	Personnel		\$0.00	\$0.00	\$0.00

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.

			<u>E</u> )	<u>kt Cost</u>	Direct Cost		Ind	l Cost	Cost Share
	Equipme	nt 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	here								



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.

				Ext Cost	Direct Cost			Ind Cost	Cost Share
	Equipn	nent Tota	als:	\$0.00	\$0.00			\$0.00	\$0.00
<b>«</b>									
+ Add Sub	category for Equipment								
D Add Tabl		<b>-</b>							
Muu Tabi	le								
	le								
	le	J							·
quipment	le								
quipment			Ex	<u>tt Cost</u>	Direct Cost			Ind Cost	<u>Cost Share</u>
quipment	Equipmen	nt Totals:	Ex	<u>tt Cost</u> \$0.00	Direct Cost \$7,580.00			Ind Cost \$0.00	Cost Share \$0.00
quipment	Equipmen Description	ut Totals: Units	Ex Unit Cost	t <u>t Cost</u> \$0.00 Extended Cost	<u>Direct Cost</u> \$7,580.00 Cost	GL Code	Item Typ	Ind Cost \$0.00	Cost Share 50.00

\*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	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 Anth Program: ATorres 3 - Economic Development PV2 Project name:	ony Torres <sup>024</sup>		
Budget Stage: Pre-Award Actions 🖹 🧿 🕻	D Budeet 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 Applica	ble 🗸 0.00	96	
Match / Cost Share Not Applica	ble 🗸 0.00	96 \$ 0.00	

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

Budget Settings							
Indirect Costs	Not Applicable 🗸	0.00					96
Match / Cost Share	De Minimus Rate Negotiated Rate	0.00	9	s	0.0	10	
	Not Applicable						

 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							Direct Cost Cost Share
¢°							Indirect Cost



2. Itemized — Include an indirect cost value next to the Cost of any line item

		Ext	<u>t Cost</u>	Direct Cost	Ind	Cost	<u>Cost Share</u>		
	Personnel Totals:	\$5	,000.00	\$7,500.00	\$75	0.00	\$0.00		
Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Indirect Cost	Cost Share	
TES	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	

3. De Minimus Rate — Calculates the federal De Minimus indirect cost rate against each budget line where you select the Indirect Cost checkbox

ost	Cost	GL Code	Indirect Cost	Item Type
.00	\$78,000.00			Direct Cost

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

Indirect Costs	Negotiated Rate	~	17.00				%
Direct Cost			Ind	Cost		<u>Cost Share</u>	
\$78,000.00			\$13,2	60.00		\$0.00	
Cost	GL Code	Indir	ect Cost	Item Ty	be		
\$78,000.00			<ul><li>✓</li></ul>	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

				E	tt Cost		Direct Cost
		Indire	ct Cost Total	s:	\$0.00		\$0.00
Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Item Typ
Indirect Cost	Indirect Cost	0.00	\$0.00	\$0.00	\$0.00		Direct Cost
Budget Stag Action	ye: Pre-Award	Bu	dge				mairectCos
\$78,000.00	Total Direct Costs						
\$11,000,00	Total Indirect Costs						
\$11,000.00							

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

Budget Settings						
Indirect Costs	Not Applicable 🗸	0.00				96
Match / Cost Share	Not Applicable 🗸	0.00	96	5	0.00	
	Percentage					
	Itemized					
	Total Amount					
Budget Items	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"

nded Cost	Cost	GL Code	Item Type	
\$0.00	\$78,000.00		Direct Cost 🛛 🗸	
			Direct Cost	
			Cost Share	
			Indirect Cost	



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

Budget Settings					
Indirect Costs	Not Applicable	~	0.00		%
Match / Cost Share	Total Amount	~	44.87	% \$ 35,000.00	

3. Itemized — Include a match/cost share value next to the Direct Cost of any line item

Ex	t Cost	Direct Cost			Ind (	lost	<u>Cost Sha</u>	are
	\$0.00	\$78,000.00			\$0.0	00	\$34,998.6	0
Cost	Extended Cost	Cost	GL Code	Co	st Share	Item Typ	e	
\$0.00	\$0.00	\$78,000.00		\$34,998.60		Direct Cost		

4. Percentage — Calculates the manually entered percentage against each budget line where you select the Cost Share checkbox

	Indirect Costs	Not Applicab	le	♥ 0.00				%
	Match / Cost Share	Percentage		✔ 20.00		%	\$ 0.00	
	Direct Cost			Ind	Cost		<u>Cost Sha</u>	<u>re</u>
	\$78,000.00			\$0	.00		\$15,600.00	D
ost	Cost	GL Code	Cos	t Share	Item	п Туре		
0.00	\$78,000.00				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

Budget Narrative	^
Enter your budget narrative below. $\checkmark$ H1       H2       H3       B       I<	
This budget includes	
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

Save Changes	Discard Changes	
Budget Narrative		
Enter your budget r	narrative below.	
Budget Stage: Pro	e-Award	
Actions		
	Budget Summary	
#70.000 Total	±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.

evisions.	New Note:
<b>Pre-Award:</b> <i>Budget Created by A.</i> <i>Trainer on 09-13-24 10:57 AM</i>	I made edits to the 981 characters remaining.

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.

Project name: Regional Business Support Project						
Goal / Objective	Target Units	c	Direct Cost Expenditure	Matching Expenditure	Pro	gram 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

- 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

Commun	ity Project ABCD A	Application [api-000554]
	• Team Members	Application Submission
In Progress	👔 Application Submissi	(!) Instructions
Completed	Core Information	Please complete the Project Infor
Completed	Project Information	
	🕯 Budget ⊿	
	Goals 🖸	
SUE	MIT APPLICATION	

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.

				1	Anthony Torres 🕒 Log out
My Applications					
🕈 My Awards	My Applications				~
📥 My Profile	Show 10 v entries			Searc	th: Economic Development
	Program Solicitation	12	Due Date	Status 🕸	Actions 🕼
	Economic Development FY2024 - ED05 Business Incubator Impact Plan State of EUNA 1, Economic Development		N/A	In Progress	=

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)



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

Economic Development	
Economic Development FY2024 - ED05	
My Applications	
Create New Application Show 10 v entries	
Grant Application	
Conomic Development FY2024 - ED03 Regional Business Support Project - 602 State of FUNA 1 Economic Development	
State of EUNA 1, Economic Development	

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

eCivis	=							Ar	nthony Torres 🛛 😕 Log
My Applications My Awards My Profile	<u>∳ cCIVIS</u>	State of EUNA 1 Economic Development Economic Development FY2024 - ED05 For any questions related to this program si Create New Application	slicitation please conta	act anthony.torres@e	unasolutions.com				
	Application Su	ubmissions							
	÷								
	Project Title	•	Submitter		Application Status	Start Date	End Date	L	Budget (
	No Businer	ss Incubator Impact Plan (api-000173)	Anthony Torres		In Progress	04/19/2024	08/01/2024		\$0.00
	Region	al Business Support Project - R02 (api-000164)	Anthony Torres		In Progress	04/01/2024	08/01/2024		\$0.00
	Econom	nic Growth Initiative [api-000174]	Anthony Torres		In Progress	04/19/2024	08/01/2024		\$0.00
	R Comm	unity Business Support Project [api-000172]	Anthony Torres		In Progress	04/19/2024	08/01/2024		\$0.00

5. 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

Project Information	Please complete all required fields below and any others that apply. Remember to osts per category.	request funds via the Budget section, entering your budgeted c
🖥 Budget 🗹	Last edited by: Anthony Torres, 11/13/2024 08:55AM	
O Goals 🖄	Project Narrative	
UBMIT APPLICATION		

6. To export a copy of the budget worksheet, open the "Budget" menu item and click the spreadsheet button at the top of the worksheet

Budget Stage:	Pre-Award
Actions	