



State of Indiana eCivis Grants Network Grantor User Guide

Creating a Solicitation January 2025

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Purpose

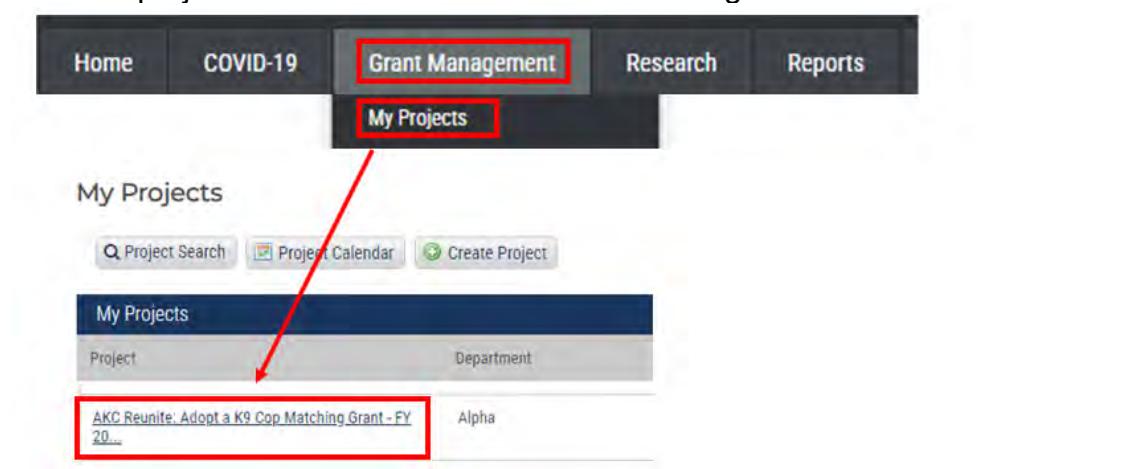
The purpose of this user guide is to provide instructions to Agency eCivis users on creating a solicitation to accept grant applications.

These steps will allow Agency eCivis users to complete the initial setup of locating the funding source within the Solicitation, create Solicitation-Program Task Approval groups, edit the solicitation, and request an Application Workspace.

Step 1: Locate a Source of Funds for the Solicitation

This initial step locates and sets up the source of funding that will be utilized in the Grantor solicitation. The source of funding must be attached to an active eCivis Project in the Grantee system, made available for pass-through funding and follow the steps described in this User Guide.

1. On the eCivis Grants Network Homepage, the Agency eCivis user will select *My Projects* from the **Grant Management** tab. Then click the name of the eCivis Grants Network project to be used as the source of funding for the solicitation.



The screenshot shows the eCivis Grants Network homepage. At the top, there is a navigation bar with tabs: Home, COVID-19, Grant Management (which is highlighted with a red box), Research, and Reports. Below the navigation bar is a sub-menu for 'My Projects' with a red box around it. The main content area is titled 'My Projects' and contains a search bar with 'Project Search' and 'Project Calendar' buttons, and a 'Create Project' button. A table titled 'My Projects' lists one item: 'AKC Reunite: Adopt a K9 Cop Matching Grant - FY 20...'. A red box highlights this project name. A red arrow points from the 'Grant Management' tab in the navigation bar down to the 'AKC Reunite' project in the list.

2. On the *Project Dashboard*, the Agency eCivis user will select the **Grant Lifecycle** tab and then will click on the *Pencil Icon* for the *Grant Awarded* Stage:

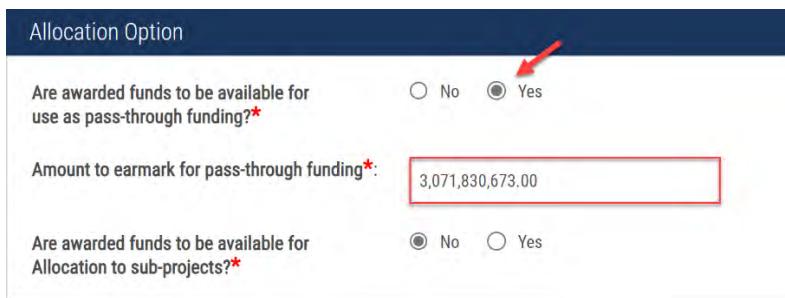


The screenshot shows the 'Project Dashboard' for the 'AKC Reunite: Adopt a K9 Cop Matching Grant - FY 2024'. The dashboard has a top navigation bar with tabs: Overview, Documents, Grant Lifecycle (which is highlighted with a red box), Goals & Metrics, Budgets, and Contracts & Accounts. Below the navigation bar, there is a section for 'Active Grants' showing 'FD19582 AKC Reunite: Adopt a K9 Cop Matching Grant - FY 2024'. At the bottom of the dashboard, there is a table with three rows: 'Grant Awarded' (with a date '04/03/2024' and a user 'M. O'Malley'), an empty folder icon, and a red box around a pencil icon. A red arrow points from the 'Grant Lifecycle' tab in the top navigation bar down to the pencil icon in the table.

NOTE: If an amendment was processed for the Project, the Agency eCivis user will click on the *Pencil Icon* for the *Grant Amendment* Stage instead of the *Grant Awarded* Stage.

3. A Grant Status form will appear and the Agency eCivis user will scroll down to the **Allocation Option** section and select Yes to **Are awarded funds to be available for use as pass-through funding?** This will make the amount entered in the next field available for a Grantor program

The Agency eCivis user must enter the **Amount to earmark for pass-through funding** that will be distributed in their grant program. All State of Indiana Agencies must select “No” to **Are awarded funds to be available for Allocation to sub-projects?** as sub-projects will not be used in eCivis.



Allocation Option	
Are awarded funds to be available for use as pass-through funding?*	<input type="radio"/> No <input checked="" type="radio"/> Yes
Amount to earmark for pass-through funding*: 3,071,830,673.00	
Are awarded funds to be available for Allocation to sub-projects?*	<input type="radio"/> No <input checked="" type="radio"/> Yes

4. The Agency eCivis user will click the *Save > button* to proceed and repeat the above steps selecting a different Grantee project if additional funding sources are needed.

Step 2: Process Guidance and Subrecipient Communications

SBA has created a best practice document for your internal agency staff and external subrecipients/grantees. An outline of this information is provided below.

1. Grantor Process Guidance
 - a. 8-weeks Prior to Announcement of Opportunity
 - b. 6-weeks Prior to Announcement of Opportunity
 - c. Award Phase
 - d. Contract Start
2. Subrecipient Communications Planning
 - e. Subrecipient eCivis Communications Steering Committee
 - f. Subrecipient Stakeholders
 - g. Key Messages
 - h. Communications Tools
 - i. Schedule and Workplan

Sample Timeline

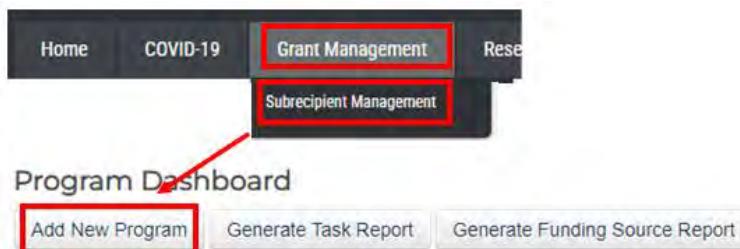
Solicitation construction begins	4/15/2024
Solicitation construction Ends	4/30/2024
<i>48 hours to configuration (receive the Zengine Application building space)</i>	
Workspace configuration	5/1/2024
<i>3 weeks to build application, scorecard, and then walk through with SBA to proof and with a week cushion</i>	
Application/Scorecard Construction	5/24/2024
Application Begins	6/3/2024
Application end	7/5/2024
Notify Applicants	7/29/2024
Project period	10/1/2024

NOTE: The schedule above is for competitive programs. Direct Award Programs do have the potential to have a shorter timeline, please contact SBA for more guidance.

Step 3: Create a Public Solicitation

Once the source of funding is set up in a Grantee project and made available for pass-through funding, the Agency eCivis user can proceed to create the Grantor solicitation.

1. From the eCivis Grants Network homepage, under the **Grant Management** tab, the Agency eCivis user will select *Subrecipient Management*. The **Program Dashboard** page will appear showing a complete list of all previously created solicitations. At the top of the page, the Agency eCivis user should click the *Add New Program > button*.



When the **Create New Program** window appears, the Agency eCivis user will fill in the required information:

- a. **Program Name:** This name will appear internally/externally and can be revised if needed.
- b. **Solicitation Type:** Using the dropdown menu, the Agency eCivis user will select one of the following options.
 - *Direct Award Process* will not require applications, collection of data, to award grant funds. (i.e., formula & non-competitive grants).
 - *Application and Peer Review Process* will require applications to be created and reviewed, if applicable, prior to being awarded grant funds.
- c. **Department:** Using the dropdown menu, the Agency eCivis user will select the Department that will manage the Program. The Agency eCivis user will only have access to the Department(s) they are associated with in the Grantee system.
- d. **Template Application:** If the **Application and Peer Review Process** is selected as the solicitation type, click the dropdown menu to select the *SOI Simplified Program Application* template.

- e. **Listing:** The Agency eCivis user will select the solicitation listing type by selecting either *Public* or *Private*.
- *Public* listings will appear on the eCivis Grants Network Public Solicitations Listing page. This is the State of Indiana recommended selection. (For example, it is visible on the public-facing [State Agency Grant Opportunities website](#).)
 - *Private* listings will not appear on the eCivis Public Solicitations Listings page and can only be accessed by providing your applicant a direct link to your solicitation.
- f. **Subprogram:** The Agency eCivis user should select *No* in response to whether the program solicitation is a subprogram, as the State of Indiana is not utilizing subprograms.

The Agency eCivis user will click the *Create Program >* button.

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.

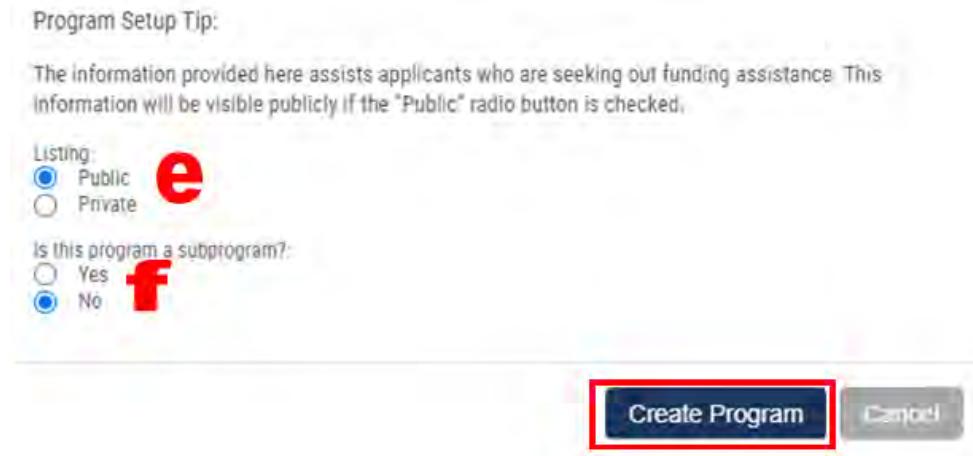
Listing:

Public **e**
 Private

Is this program a subprogram?

Yes **f**
 No

Create Program **Cancel**



2. If you are not taken directly to the **Solicitation Edit** page, click the *Edit Solicitation > Button* as shown below. The **Solicitation Edit** page is where the Agency eCivis user builds out the solicitation. Initially, each section header is marked with an "X" indicating that it is incomplete. Once a section is completed, the section header will be marked with a green checkmark. To request an application workspace or publish a solicitation, all section headers must have a green checkmark.

Program Detail

marine highways mon 20 Draft

Department: Alpha
Total Funding: \$0.00
Application Period: 07/01/2024 - 07/31/2024

Subrecipient Reporting Subrecipient Monitoring Add Task Edit Solicitation

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

3. **Overview:** The Agency eCivis user should enter the information requested in this tab. Please note the required fields are indicated with an (*). All Overview information will be visible to the applicants.

- a. **Title:** Grant program name.
- b. **Fiscal Year:** The applicable State Fiscal Year (SFY) or Federal Fiscal Year (FFY) for the program.
- c. **Application Start Date:** The first date that the Agency eCivis user's Department is accepting applications.
- d. **Application End Date:** The last date that the Agency eCivis user's Department is accepting applications. Applicants can no longer apply once this date has passed.
- e. **ID:** Any other grant program identifier.
- f. **CFDA/ALN:** Catalog of Federal Domestic Assistance number, if applicable (Assistance Listing Number).
- g. **Reference URL:** A link to a website for the grant program, if available. Otherwise, leave this field blank.
- h. **Listing Availability:** Public or Private. (selecting public will place this program on the SBA Public Solicitation Listings page). Public is the recommendation.
- i. **Summary:** Provide any narrative information that is appropriate regarding the grant program such as its purpose.

The Agency eCivis user will click the *Save > button* once the **Overview** section is complete.

4. Eligibility: The Agency eCivis user should enter the information requested on this tab. Please note that the required fields are indicated with an (*). All Eligibility information will be visible to the applicants.

- Eligible Applicants:** Select all that apply.
- Eligibility Notes:** Provide any additional eligibility information that may assist applicants with determining if they are eligible and/or their projects are eligible.

The Agency eCivis user should click the **Save > button** once the **Eligibility** section is complete, then proceed to editing the next section.

5. Financial: In the **Total Funding** section, the Agency eCivis user will begin by adding the eCivis Grants Network funding source(s) to the solicitation. The required

fields are indicated with a *red asterisk (*)*. All Financial information will be visible to the applicants.

- a. The Agency eCivis user will click the *Add Funding Source > button*.
- b. All Agencies must select *Pass-Through Funding* in the funding type drop-down box.
- c. The Agency eCivis user will select the corresponding department, project, and grant from the dropdown boxes. The **Total Available** field will populate with the funding source's total funds available.
- d. The Agency eCivis user will enter the amount of funds allocated to this program in the **Total Allocation** field. The total allocation cannot be more than the total available.

Once the Financial section is complete, click the *Save Funding > button*.

Total Funding \$99,000,000.00:*

0% US17293 Airport Rescue Grants - FY 2021 (\$99,000,000.00)  

Assign Default Payment Allocation **Add Funding Source** **a**

Display the total funding amount on the external solicitation page:
 Yes No

Permit Multi-Term Projects:
 Yes No

Matching Required:*

Yes
 No
 Recommended

Award Amount: (min) (max)

Number of Awards:

Average Award Size:

Financial Notes:*

more into

Source  

Step 3 of 9 * = Required for Section Completion

Add Funding Source

Choose Funding Type:*

Pass-Through Funding 

b

Select Department:*

Alpha 

c

Select Project:*

Airport Rescue Grants - FY 2025 

Select Grant:*

US17293 Airport Rescue Grants - FY 2021 

Total Available:*

d

Total Allocation:*

Save Funding > **Close >**

Repeat the steps above if multiple funding sources need to be associated with this Solicitation. Once the eCivis funding source(s) is added, you have the option to assign allocation percentages to your funding sources. Click the *Assign Default Payment Allocation > button*.

Total Funding \$99,000,000.00:*

0% US17293 Airport Rescue Grants - FY 2021 (\$99,000,000.00)  

Assign Default Payment Allocation **Add Funding Source**

- e. **Funding Source Default Payment Spread:** If this program utilizes multiple funding sources, the Agency eCivis user may enter the percentage for each default payment for each funding source(s) and click the **Save > button**.



Funding Source Default Payment Spread

Please enter a percentage for default payment from each program funding source. This information is used to default payment amounts from each fund on the payment screen when paying against a reimbursement request on a financial report.

100 %

US17293 Airport Rescue Grants - FY 2021 (\$99,000,000.00) Federal

Save > Cancel >

NOTE: If there is only one Funding Source, the Agency eCivis user will input “100%”. Alternatively, you can enter the percentage when approving a financial report.

Select or enter a response to the remaining questions:

- f. **Display the total funding amount on the external solicitation page:** Selecting Yes or No will display the amount entered from the Total Allocation in the Financial section.
- g. **Permit Multi-Term Projects:** All Indiana agencies must select *No* as this functionality was built for another eCivis client and will not work for Indiana.
- h. **Matching Required:** Selecting Yes/Recommended will initiate a dropdown menu to appear and the Agency eCivis user must select the **Matching Type** from *Cash, In-Kind, or Cash/In-Kind*.
- a. **Award Amount (min) and (max):** An Agency eCivis user can select to enter both a min and max, or just one of these, to inform the applicants.
- b. **Number of Awards:** If no data is entered, it will appear as “N/A” in the external solicitation.
- c. **Average Award Size:** If no data is entered, it will appear as “N/A” in the external solicitation.
- d. **Financial Notes:** An Agency eCivis user can provide more information as it relates to the eligible, allowable costs (or non-allowable costs) along with any other information.

Once the **Financial** section is complete Click the **Save > button**.

Display the total funding amount on the external solicitation page: **f**

Financial Notes: ***** * = Required for Section Completion

Step 3 of 9

Permit Multi-Term Projects: **g**

Matching Required? *****
 Yes **h**
 No **g**
 Recommended

Award Amount: **i** (min) **j** (max)

Number of Awards: **j**

Average Award Size: **k**

Save > **Done >**

6. Contact: This information can be used to contact the grant program manager/office with questions and will be included with some of the automated emails that come from eCivis i.e. Direct Award Notice, Application Denied message, Application Award Notification. Please note that the required fields are indicated with an (*). All Contact information will be visible to the applicants.

- Agency Department:** The Indiana State Agency associated with initiating the solicitation will automatically appear here.
- Contact/Help:** This is the email address you want your applicants to contact for any questions while they are filling out their application and/or accepting their award, if applicable. This email address will be the default email recipient of communication on this solicitation.
- Office:** A specific office within an Indiana State Agency.
- Program Contact:** Contact information for the Program Manager or other points of contact.
- Application Address:** It is recommended to click the *Program Contact & Application Address are the same* option. This duplicates the previous selection.
- Contact Notes:** Any additional contact notes necessary for applicants. SBA does recommend including the following information for technical questions.

For technical support with the eCivis platform, please review the SBA: NextLevel Grants Management website. <https://www.in.gov/sba/grants/resources-for-subrecipients/>

Once the **Contact** section is complete, click the **Save > button**.

Overview ✓ Eligibility ✓ Financial ✓ Contact ✘ Files ✘ Review ✘ Submission ✘ Goals ✘ Approval ✘

Step 4 of 9 * = Required for Section Co

Agency/Department: Alpha **a**

Contact/Help: **b**

Office: **c**

Program Contact*: **d**

Program Contact & Application Address are the same.

Application Address*: **e**

Contact Notes: **f**

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

Save ➤

7. **Files:** Enter the information requested in this tab as appropriate. Please note that the required fields are indicated with an (*). All Files information will be visible to the applicants.

- g. **Current Files:** Click the *Add File >* button to upload any documents that will be needed by applicants during the application submission process. Some examples include:
 - Notice of Funding Opportunity (NOFO)
 - Frequently Asked Questions (FAQs)
 - Additional budget or financial spreadsheet
 - Select appropriate File Label from the drop-down menu: NOFA, Application, Budget, Guide, FAQ, Other.
- h. **Application Submission Notes:** Agency eCivis users will leave this part blank as eCivis no longer uses this field.
- i. **File Notes:** Details or instructions about the use of each file included.

Once the **Files** section is complete, click the *Save >* button.

Overview ✓ Eligibility ✓ Financial ✓ Contact ✓ Files ✘ Review ✘ Submission ✘ Goals ✘ Approval ✘

Step 5 of 9 * = Required for Section Co

Current Files: **a**

No data available in table

Add File ➤

Application Submission Notes: **b**

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

Save ➤

8. Review: Add reviewers to the program's Review Committee.

Please note that the required fields are indicated with an (*). This team may be updated before, during, or after the application window is completed. All Review information will be Agency facing and not visible to the applicants.

- a. **Review Committee:** Click the *Add Reviewer >* button to begin creating your committee. The **Add Reviewer** pop-up window will appear and require *First Name*, *Last Name*, and *Email*. Agency eCivis users and external users may be added as a Reviewer in the Review Committee.

Click the *Add Reviewer >* button once completed. If additional reviewers must be added, repeat the steps above as needed. Once this step is completed, click the *Save >* button to proceed.

- b. Review notes can be added here to provide more details for eCivis Customer Support, if needed.

Once the **Review** section is complete, click the *Save >* button.

The screenshot shows the eCivis application interface with the following details:

- Top Navigation:** Overview (green checkmark), Eligibility (green checkmark), Financial (green checkmark), Contact (green checkmark), Files (green checkmark), Review (red X), Submission (red X), Goals (red X).
- Step Progress:** Step 6 of 9. A note: ★ = Required.
- Review Committee Section (labeled 'a'):** A table with one row: "mark" (checkbox), "omalley" (text), and "omalley@sba.in.gov" (text). An "Add Reviewer" button is highlighted with a red box.
- Add Reviewer Pop-up (highlighted with a red arrow from the 'a' label):** A modal window with fields for "First Name*", "Last Name*", and "Email*". Each field has a red arrow pointing to it. An "Add Reviewer" button is highlighted with a red box.
- Review Notes Section (labeled 'b'):** A rich text editor with a toolbar. A note: "Review notes may be used to provide instructions to your cust that will help them in designing the application and submission solicitation. Once you have marked your solicitation complete, representative will follow up within one business day to confirm These notes will not appear to applicants." A "Save" button is highlighted with a red box.
- Bottom Note:** "Use the tabs to complete the solicitation. Make sure to click Save when making changes."

9. Submission: In the Submission Tab, you will manage important settings for your submission and subrecipient portal. Please note that the required fields are indicated with an (*). All Submission information will be Agency facing and not visible to the applicants.

- a. **Primary Workspace Email:** The email address that receives the initial invitation to the Application Workspace. Once the invitation is accepted, this individual can proceed to invite other team members as needed.
- b. **Accept multiple applications per user:** Will determine whether applicants can submit more than one application on this program. This selection cannot be changed once the solicitation is published.
- c. **Budget Development:** Indiana requires “yes” selection. You **must** use a budget in your grant program even if you only use a single budget category for all expenses.
- d. **Budget Template:** Indiana requires Agencies to select either the “SOI Program Budget” or “SOI Construction Budget” from the dropdown menu. This selection cannot be changed once the solicitation is published.

Overview ✓ Eligibility ✓ Financial ✓ Contact ✓ File

Primary Workspace Email: * a
 The primary workspace email will receive an invitation to the administration workspace to manage the solicitation process. Additional emails may be added within the administration workspace.

Accept multiple applications per user: * b
 Yes No

Note: Once a solicitation has been published, this selection may not be changed.

Budget Development: * c
 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.

d **Budget Template:** SOI Program Budget

- e. **Contract Number:** The Agency will select “No” so the eCivis system cannot autogenerate a Contract Number.
- f. **Collect Detailed Financial Reports:** Selecting this box will require subrecipients to enter a GL code and description from a pre-determined list created by the agency for a budget category or spending report. SBA suggests not selecting this box. If the box is selected, then the Agency eCivis user will need to click the **Detailed Financial Report Options** and begin creating the GL codes and Descriptions pick list. For help on this selection, please reach out to the SBA team.
- g. **Require Invoice Number on financial reports:** This needs to be left unchecked for all Agencies. An Invoice Number is required when the Financial

Report is approved by the agency. If you check this box, the initial approver will need to enter invoice number. Program staff are typically the first approver and do not have this information available.

- h. **Require Receiver ID on financial reports:** SBA recommends leaving this unchecked as this field is not being utilized. If you check this box, the initial approver will need to enter a value in this field prior to approving the report.
- i. **Track program income with Finance Reports:** Leave the default selection as it is.

Contract Number:^{*}

Would you like to have Grants Network autogenerate a contract number when an award is made?

Yes No **e**

Prefix:

Note: Contract Number prefix must be unique for your Organization. A -XXXX will be appended to all contract numbers.

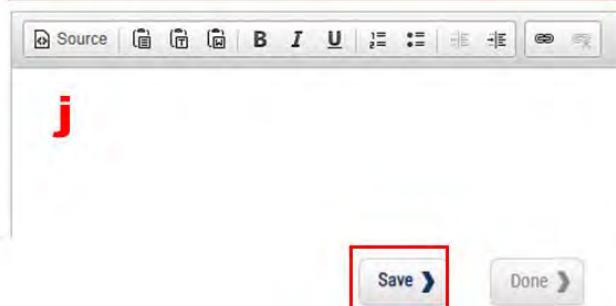
- Collect Detailed Financial Reports **f** (i)
- Require Invoice Number on financial reports **g**
- Require Receiver ID on financial reports **h**
- Track program income with Finance Reports **i**
 - Additive
 - Subtractive
 - Apply to match

- j. **Submission Notes:** This textbox should be used to provide instructions to the eCivis customer service representative regarding configuration of the application/ submission process for this solicitation. These notes will not appear to applicants. Follow the guidance provided on this screen by entering detailed information about the date and time of the submission deadline (please include EST).

Once the **Submission** section is complete click the *Save > button* to proceed.

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.



A screenshot of a rich text editor interface. At the top, there is a toolbar with various icons: Source, Bold, Italic, Underline, and others. Below the toolbar is a text area containing a single red letter 'j'. At the bottom of the editor, there are two buttons: 'Save' with a red arrow pointing to it, and 'Done'.

10. Goals: This section is not required. If goals or metrics will be included in the application and reported on by subrecipients in the post-award grantor process, you will create those here.

- a. **Add Solicitation Goal:** Click the *Add New Goal >* button to get started. Enter the Goal, Title, and Target Units (in numbers only) then click *Save Goal >* button to continue. Please note that the required fields are indicated with an (*). Additional fields will appear, including the option to *Add Subgoal* for further specification that can include text and numerical specification. Repeat these steps as needed to add multiple goals to your program.
- b. Enter in goal notes to provide instruction to your applicants during the application process.

Once the **Goal** section is completed click the *Save >* button to proceed.

Step 8 of 9 * = Required for Section Completion

Please enter the goals you have for this program. These goals will be

Add New Goal

a

Goal

No goals currently exist for this solicitation

10 records per page

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.

b

Save Done

11. Approval: All Approval information will be Agency facing and not visible to the applicants. The Agency eCivis user can view the Task Type descriptions by clicking the *Information > button* located to the right of each task name. The Agency eCivis user will assign the task to the appropriate team member on the Agency side by clicking the *Pencil Icon > button* on the right side of the task row:

Overview ✓ Eligibility ✓ Financial ✓ Contact ✓ Files ✓

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

Task Type	Approver	Workflow
Recommendation Approval	Undefined	
Final Award Approval	Undefined	
Activity Report Approval	Undefined	

Each task will ask the Agency eCivis user to designate an approval type. Please note that the required fields are indicated with an (*):

- **Standard:** Requires an approval by an assigned approver or member of an approval group. In a group, once any member approves the task, it is considered complete.
- **Sequential:** Requires each approval group member to approve in a specific order, one after another.

Based on the approval type, the **Designated for Approval** option can either be set to User or User Group. You will then need to select the User, by Department, or User Group.

Once the Approval section is complete click the *Save > button* to proceed until all eleven tasks are completed.

Select Approval Workflow

Define a workflow for the Award Recommendation Approval Task

Approval Type: Standard Sequential **a**

Designated for Approval: User **b**
Choose a user that will be designated as approver
Select Department

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

Save > **Close >**

Step 4: Approval Tasks and Extra Assignment Steps

All eleven **Approval Tasks** require an Approval Type and selection in the Designated for Approval section. Below is a definition of each Approval Task Type.

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

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

Step 8 of 8 * = Required for Section Completion

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 **Add File**

No data available in table

Task Notifications
Do you want to send reminder emails to subrecipients for upcoming and past due tasks?
 None Weekly

- 1. Recommendation Approval:** The Agency eCivis user assigned to this task will review the award recommendation created in eCivis. The Agency eCivis user can work with the applicant to make final budget adjustments, if needed, during this step.
- 2. Final Award Approval:** The Agency eCivis user assigned to this task will review any award accepted by an applicant. The award recommendation will need final approval from the Agency eCivis user before an application enters awarded status.
- 3. Activity Report Approval:** The Agency eCivis user assigned to this task will review and approve any activity/program report submitted by a subrecipient. Additionally, you can enter instructions for the subrecipient to utilize when submitting an activity report.

Select Approval Workflow

Define a workflow for the Activity Report Task

Approval Type:*

Standard  Sequential 

Designated for Approval:*

User
Choose a user that will be designated as approver

Alpha 

Mark O'Malley 

Instructions: 

instructions for approvers go here.



The Agency eCivis user can also define a frequency for the Activity Report Task by setting the interval and specifying the start and end dates. Once the task assignment is finished, click the **Save > button** and proceed to the next task.

Define an optional frequency for the Activity Report Task 

Frequency:

Interval:*

On:*

Starting:*

Until:

4. Financial Report Approval: The Agency eCivis user assigned to this task will review and approve any financial report/reimbursement request submitted by a subrecipient. Additionally, you can enter instructions for the subrecipient to utilize when submitting a financial report.

Instructions:



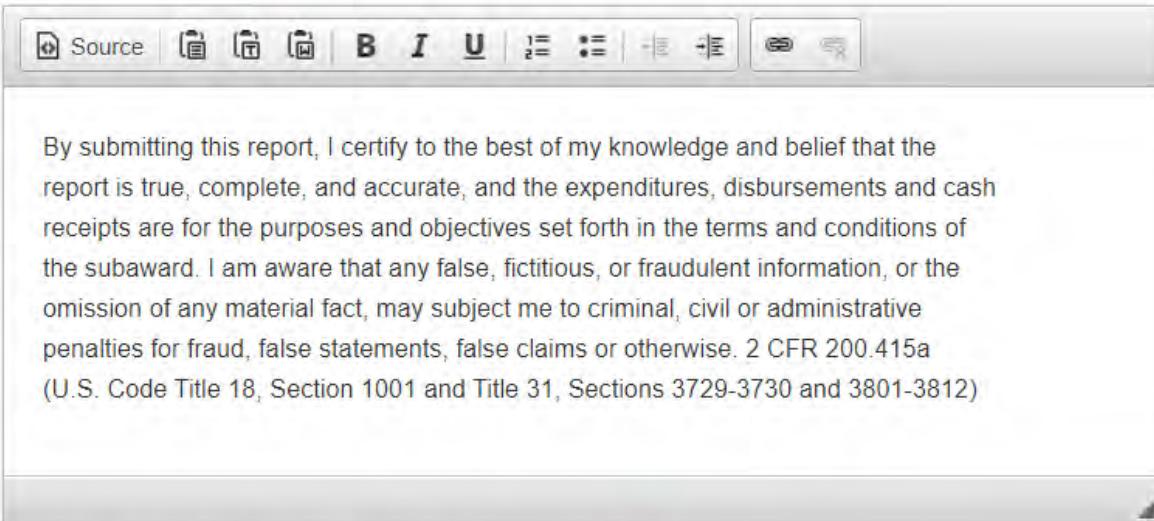
more instructions

When completing this task setup, the Agency eCivis user will leave the “*Display acknowledgement statement*” as Yes. The **Acknowledgement Statement** in the dialogue is Uniform Grant Guidance and must not be changed by the Agency eCivis user.

Display acknowledgement statement:*

Yes No

Acknowledgement Statement:*



By submitting this report, I certify to the best of my knowledge and belief that the report is true, complete, and accurate, and the expenditures, disbursements and cash receipts are for the purposes and objectives set forth in the terms and conditions of the subaward. I am aware that any false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil or administrative penalties for fraud, false statements, false claims or otherwise. 2 CFR 200.415a (U.S. Code Title 18, Section 1001 and Title 31, Sections 3729-3730 and 3801-3812)

Edit the default Uniform Guidance acknowledgement (not recommended)*

Yes No

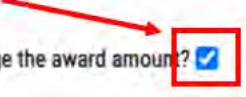
The Agency eCivis user can also define the frequency for the **Financial Report Task**, just like in the **Activity Report Task** section above. Once the task assignment is finished, click the *Save > button* and proceed to the next task.

5. Amendment Approval: The Agency eCivis user assigned to this task will review and approve any Amendment requests initiated **by the subrecipient**. If you want to use this workflow for financial amendments that do not have financial impact to the award amount, be sure to check the box as indicated below.

Define a workflow for the Grant Amendment Approval Task

Approval Type* Standard Sequential

Use this workflow for grant financial amendments that do not change the award amount?



Once the task assignment is finished, click the *Save > button* and proceed to the next task.

6. Amendment Approval with Finance: The Agency eCivis user assigned to this task will review and approve any Amendment requests initiated **by the subrecipient** involving a financial change. Once the task assignment is finished, click the *Save > button* and proceed to the next task.

7. Grantor Amendment Approval: The Agency eCivis user assigned to this task will review and approve the amendment initiated by the Agency/Grantor after the subrecipient has approved the amendment in the eCivis Portal. Once the task assignment is finished, click the *Save > button* and proceed to the next task.

8. Grantor Amendment Approval with Finance: The Agency eCivis user assigned to this task will review and approve the amendment **WITH** a financial change that has been initiated by the Agency/Grantor. This approval will occur after the subrecipient has approved the amendment in the eCivis Portal. Once the task assignment is finished, click the *Save > button* and proceed to the next task.

9. Grantor Amendment Final Approval: The Agency eCivis user assigned to this task will review and approve the amendment once reviewed/approved by the Agency eCivis user in the previous Amendment Approval tasks above. This is the final approval in the amendment process with or without a financial change. Once the task assignment is finished, click the *Save > button* and proceed to the next task.

10. Return of Funds Approval: The Agency eCivis user assigned to this task will review and approve a return of funds that is initiated by the Agency/Grantor. Once the task assignment is finished, click the *Save > button* and proceed to the next task.

11. Closeout Approval: The Agency eCivis user assigned to this task will review and approve the final Financial Report from the Subrecipient. All Financial Reports and Amendments must be in the Approved status for the Subrecipient to initiate

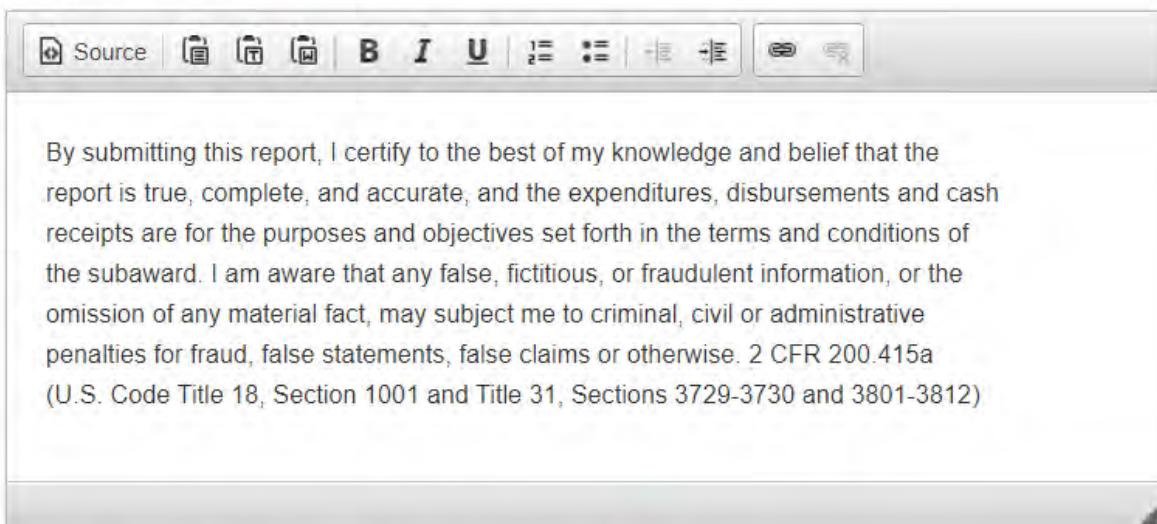
Award Closeout. Any Activity reports that are Pending Approval will be automatically approved when the grantor accepts this report. Any unspent funding will be unavailable to request for reimbursement after this report has been submitted.

When completing this task setup, the Agency eCivis user will leave the “*Display acknowledgement statement*” as Yes. The **Acknowledgement Statement** in the dialogue is Uniform Grant Guidance and must not be changed by the Agency eCivis user.

Display acknowledgement statement:*

Yes No

Acknowledgement Statement:*



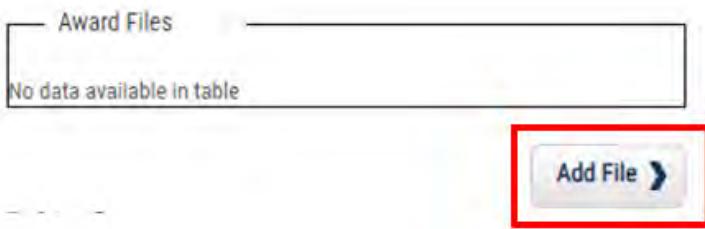
By submitting this report, I certify to the best of my knowledge and belief that the report is true, complete, and accurate, and the expenditures, disbursements and cash receipts are for the purposes and objectives set forth in the terms and conditions of the subaward. I am aware that any false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil or administrative penalties for fraud, false statements, false claims or otherwise. 2 CFR 200.415a (U.S. Code Title 18, Section 1001 and Title 31, Sections 3729-3730 and 3801-3812)

Edit the default Uniform Guidance acknowledgement (not recommended)*

Yes No

Once the task assignment is finished, click the *Save > button* and proceed to the next task.

•**The Award Files** button allows the Agency eCivis user to include any common documents that all subrecipients will need as part of the award package. Just click the *Add File* button and follow the uploading directions.



Award Files
No data available in table

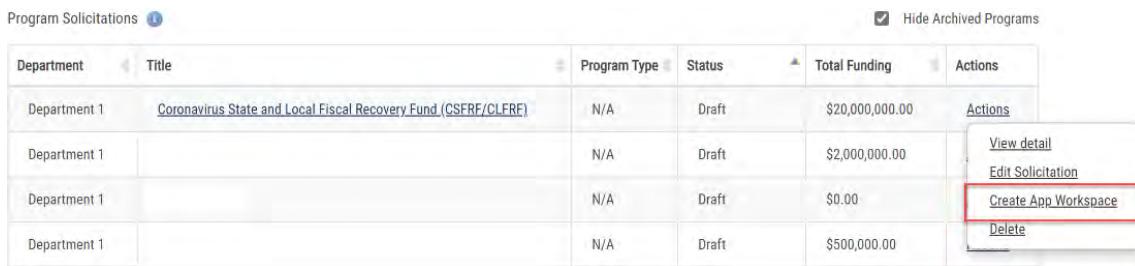
Add File

If you have subrecipient specific documents, you can attach those files during the awarding process for that individual subrecipient. This step is optional.

Once the approval workflows are defined for ALL the **Task Types**, this step is completed; click the **Save > button** to proceed.

Step 5: Creating the Application Workspace

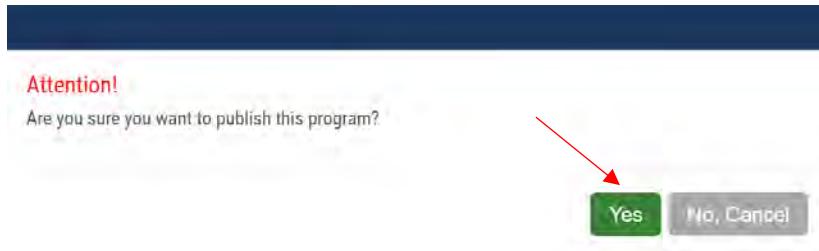
1. Once the Indiana State agency thoroughly reviews each section of the solicitation and ensures that all section header tabs are marked with a green check mark, the Application Workspace is ready to be configured. Click the *Done* button on the bottom right-hand side of any of the Solicitation screens.
2. The Agency eCivis user will be taken to the program dashboard. Find/Search for the program that needs an App Workspace created. Click on the *Actions > button* to the right of the program name's Title and select **Create App Workspace**.



A screenshot of a web-based application interface titled "Program Solicitations". The table lists several program entries with columns for Department, Title, Program Type, Status, Total Funding, and Actions. The "Actions" column contains links: "View detail", "Edit Solicitation", "Create App Workspace" (which is highlighted with a red box), and "Delete".

Department	Title	Program Type	Status	Total Funding	Actions
Department 1	Coronavirus State and Local Fiscal Recovery Fund (CSRF/CLFRF)	N/A	Draft	\$20,000,000.00	Actions
Department 1		N/A	Draft	\$2,000,000.00	View detail Edit Solicitation Create App Workspace Delete
Department 1		N/A	Draft	\$0.00	View detail Edit Solicitation Create App Workspace Delete
Department 1		N/A	Draft	\$500,000.00	View detail Edit Solicitation Create App Workspace Delete

3. An additional pop-up window will appear. Click the **Yes** button to publish your solicitation.



4. The application configuration process will begin. An eCivis, system-generated email stating the solicitation is **Under Review** is sent to the Primary Workspace email address. In addition, the status of the program's solicitation will then be updated to **Under Review**.



A screenshot of the "Program Solicitations" list. The table shows a single row for "Coronavirus State and Local Fiscal Recovery Fund (CSRF/CLFRF)". The "Status" column is highlighted with a red box and contains the text "Under Review".

Department 1	Coronavirus State and Local Fiscal Recovery Fund (CSRF/CLFRF)	N/A	Under Review	\$18,000.00	Actions
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5. Once the workspace has been configured, eCivis Support will send an email to the Primary Workspace email provided in the solicitation letting you know that your workspace has been configured. The process takes up to 2 business days.

From: Jeremy Evans <jeremy.evans@eunasolutions.com>

Sent: Tuesday, April 2, 2024 8:10 PM

Hello,

Your program, Mentoring for Youth with Serious Emotional Disabilities in IN has been configured.

If you would like it to be published so that it is available to the public, please reach out to SUPPORT@ECIVIS.COM to request publication.

Please also review the following forms to ensure accuracy before requesting publication:

- Profile Form
- Application Form
- Additional application forms (*if applicable)
- Review Forms

Jeremy Evans
Technical Support Representative I



6. A second email will come from Zengine with an invitation link. Click on “Accept Invitation to Join Zengine Workspace” link to access the Zengine Application Workspace. If you are not already signed in, that link will take you to the Zengine login page. If you have not created a Zengine account, you will need to do so at this time.

From: zengine436520@eunaiscivis.com

Sent: Wednesday, March 15, 2023 2:12 PM

To:

Subject: [EXTERNAL] You have been invited to join the workspace "State of Indiana Title IV (V2)" on Zengine.

zengine436520@eunaiscivis.com has invited you to join the workspace: State of Indiana Title IV (V2) on Zengine.

Hey Zengine user, ready to expand your horizons?

By accepting this invitation you will be brought directly to the Zengine home screen (after signing in to the application), and can then access this new workspace.

[Accept Invitation to Join Zengine Workspace](#)

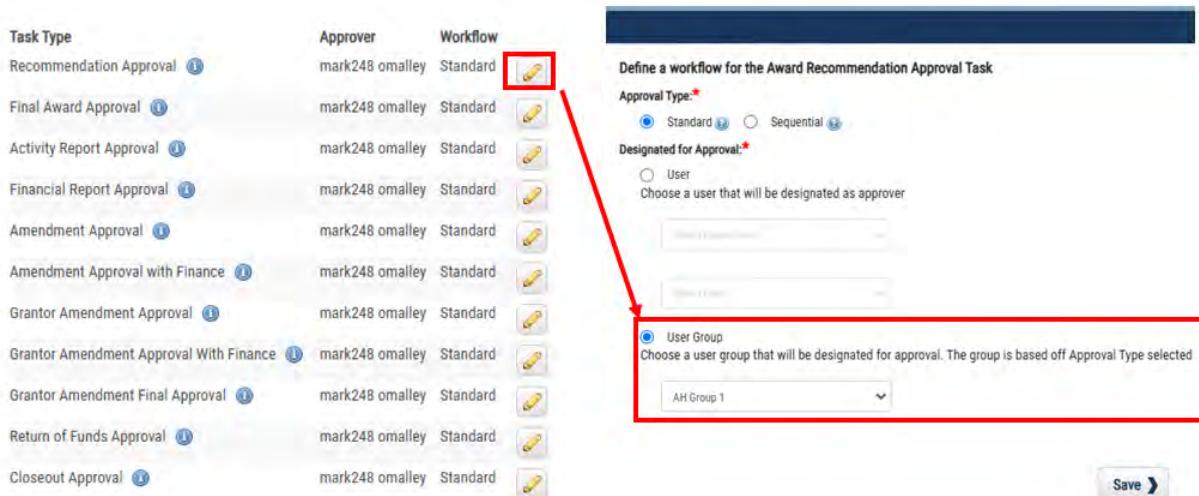
If the link above does not open, you can also copy and paste the following address into your browser: https://platform.zenginelab.com/inviteCode=e43652021767d41a4c2f6a358e500894workspace_id=36520&email=

Learn more about [Zengine](#) or contact us with any questions at 1-877-767-8483 or support@eunaiscivis.com and we can assist you. Thank you.

The Zengine Team

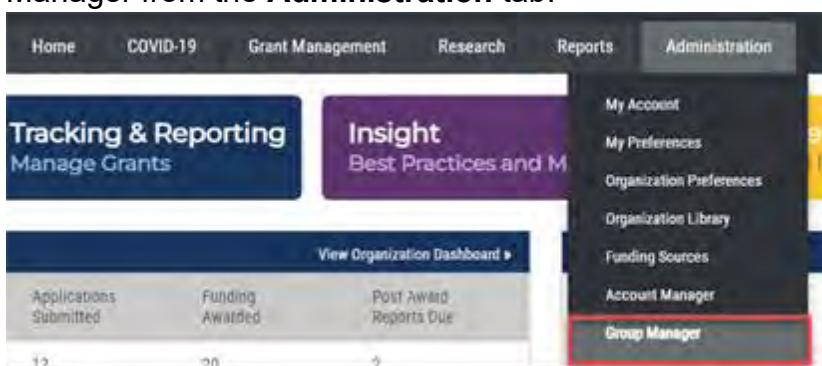
Step 6: Create/ Manage Approval Groups for the Solicitation

To create approval groups to complete various tasks throughout the grant lifecycle the Agency eCivis user must contact their Agency's Department Master Account Holder (DMAH) with detailed information to complete the following steps and create an approval group. Approval Groups can be assigned during the workflow assignment process.



The screenshot shows the eCivis Grants Network homepage. On the left, a table lists various approval tasks with columns for Task Type, Approver, and Workflow. The 'Workflow' column contains icons for edit and delete, with the edit icon highlighted by a red box. A red arrow points from this icon to a detailed configuration window on the right. The configuration window is titled 'Define a workflow for the Award Recommendation Approval Task'. It includes fields for 'Approval Type' (radio buttons for 'Standard' and 'Sequential'), 'Designated for Approval' (radio buttons for 'User' and 'User Group'), and a dropdown menu for 'User Group' containing 'AH Group 1'. A 'Save' button is at the bottom right of the configuration window.

1. The Agency eCivis user should determine the approval workflow for each and decide whether each task will need one or multiple approvers.
2. On the eCivis Grants Network homepage, the Agency's DMAH will click Group Manager from the Administration tab.



The screenshot shows the eCivis Grants Network homepage with the 'Administration' tab selected. The 'Administration' menu is open, showing options like 'My Account', 'My Preferences', 'Organization Preferences', 'Organization Library', 'Funding Sources', 'Account Manager', and 'Group Manager'. The 'Group Manager' option is highlighted by a red box.

3. Click the *+Add New Group* button and enter the required information indicated with a red asterisk (*).

- a. **Group Name:** Group names are required to include the 3-4 letter Indiana State Agency acronym at the start of their name.

Additional elements to include in the group name include:

- The term “Grantor”
- Program Name/ Grant Name
- Function (i.e. Programmatic, Financial, etc.)
- Example: *SBA Grantor SLFRF Financial*

- b. **Description:** Purpose or reason for the approval group and/or its members.

- c. **Type:**

- **Standard:** All group members will receive notification via email, simultaneously, and any individual approver within that group may complete the task.
 - **Sequential:** Group members will be notified to complete the task in a sequence determined in the Group Manager settings.
- d. **Select from Department, Users, and Groups:**
- Select the **Department** of the Agency eCivis user.
 - A list of Agency eCivis users within that Department will appear in the **Users** field.
 - If **Sequential** was previously selected, an additional **Groups** field will appear. This will enable the Agency eCivis user to incorporate previously created groups into the new approval group.
 - Select **Users** or **Groups** and click the left and right arrow buttons to add or remove them from the **Group Members** list.

In the **Group Members** list, the up and down arrows can be used to determine the sequence of approval in a **Sequential** group. The group or user at the top of the Group Member list will complete the first approval and then move down the list for the approvals that follow in the sequence.

Add New Group

Group Name Description:

Type Standard Negotiable

Select from Department, Users, and Groups

Select (or) move Department on the left to move the list of users on the right, or select from the list of open groups.

Departments: Agency A, Agency B, State Budget Agency

Users: (empty)

Group Members: (empty)

Groups: SBA Amendment (standard), SBA Assistant - Agency A (standard), SBA Assistant - Agency B (standard), SBA Financial (standard), SBA Grants (standard), Departmental Group TESS (standard)

Save Cancel

4. Once the approval group is created, click *Save > button*. Repeat the above steps to create additional approval groups.

Conclusion

Once the Zengine Application Workspace invitation is accepted by the Agency eCivis user then a review of the *SOI User Guide - Grantor 2. Application and Score Card Creation* for instructions on creating the program's application and viewing the budget should begin.

Definitions

Agency eCivis user – A user of eCivis Grants Network. This is a State of Indiana staff person using the system as a Grantee or Grantor. See Grantee and Grantor.

Applicant – An individual or entity applying to a grant program.

Application – The specific set of forms, documents, and attachments that comprise an Applicant's submission to a solicitation. See *Solicitation*.

Application Workspace – An Application Workspace is created for authorized Agency eCivis users to view and create their application and evaluation forms outside of any State of Indiana required fields for competitive solicitations. It will also include the budget selected at solicitation, but it is not editable. The Application Workspace allows Agency eCivis users to identify application review team members, make application review assignments, and tabulate review results and scores. See also *Solicitation* and *Zengine*.

Approval Groups – Groups of State of Indiana employees responsible for approving tasks e.g., State Budget Agency (SBA) pursuance approval or financial reports with/without payment/reimbursement requests from Subrecipients. Approval groups may be set up so that any one person in the group can approve the task (Standard) or that all members of the group must approve the task in a specific sequence (Sequential).

Assistance Listing – Formerly known as the Catalog of Federal Domestic Assistance (CFDA), it refers to the publicly available listing of Federal assistance programs managed and administered by the General Services Administration (GSA).

Assistance Listing Number (ALN) – A unique number assigned to identify a Federal Assistance Listing, formerly known as the CFDA number. See *Assistance Listing*.

Budget – The financial information Applicants are required to submit to the Funder or Grantor detailing how they will spend grant funds, if awarded. This budget is carried over to the awarded grant so that the Grantee or Subrecipient reports financial information at the level of detail required by each grant program.

Cash Match – A portion of project costs not paid by Federal funds as a direct project expense ([2 CFR 200.306](#)). This portion of the project costs are provided as cash from the Indiana State Agency or State of Indiana resources.

Catalog of Federal Domestic Assistance (CFDA) Number – Now known as the Assistance Listing or Assistance Listing Number (ALN), it refers to the publicly available listing of Federal assistance programs managed and administered by the General Services Administration (GSA). eCivis will be updating the system to remove CFDA.

Configuration – The process of connecting the grant solicitation to the Application Workspace as a Grantor for competitive solicitations. This occurs when the Agency eCivis user clicks *Create App Workspace*. This requires eCivis technical support to assist with finalizing the process.

Department – Departments built within eCivis Grants Network. A single Indiana State Agency may have one or more departments within eCivis Grants Network representing their divisions, offices, agencies, etc.

Department Master Account Holder (DMAH) – An Agency eCivis user that can see across their entire eCivis Grants Network listing or department, typically an Indiana State Agency Lead. Please see the [State of Indiana eCivis Policy: User Management](#) for more information.

eCivis – The software vendor that created eCivis Grants Network (Indiana State Agencies as Grantees/Grantors) and eCivis Grants Portal (Applicants/Subrecipients to Indiana State Agencies' grant programs).

eCivis Project – Project is used in two ways within eCivis Grants Network, Grantee project and Grantor project. See Grantee Project and Grantor Project.

Evaluator – The person responsible for reviewing and evaluating a grant application. An Evaluator may be a State of Indiana employee or an external party (non-State of Indiana employee). Reviewers do not need to have an eCivis Grants Network license/account. Also referred to as a Reviewer or Peer Reviewer.

Federal Award Identification Number (FAIN) – The unique identifier within the Federal agency for each financial assistance award.

Federal Fiscal Year (FFY) – The 12-month period the Federal government uses for financial or budgetary reporting. The FFY begins on October 1st and ends on September 30th. For example, FFY 2023 begins October 1, 2022, and ends September 30, 2023.

Financial Report (Payment or Reimbursement Request) – The task assigned to a Grantee or Subrecipient to submit financial data. Financial reports can also include payment or reimbursement requests within them. These reports are usually recurring in nature through the grant term.

Funder – See Grantor.

Goals – The outcomes to be achieved as a byproduct of the projects or programs administered by an Indiana State Agency. Goals can be captured and tracked in eCivis Grants Network, depending on the requirements of each grant program.

Grant Amendment – An amendment (either initiated by the Grantor or Grantee/Subrecipient) that will officially change the terms of the agreement. An amendment can edit the scope of work, grant term, or financial information.

Grant Program – See Program.

Grant Tags – Also referred to as Organization Tags. They are a tool used in eCivis Grants Network to help further identify and organize projects and grants.

Grant Term – See Period of Performance.

Grantee – Persons or organizations who receive funding from another party. Indiana State Agencies operate in the role of a Grantee when they receive funding from external parties like the Federal government. A Grantee is also referred to as a Subrecipient.

Grantee Project – Indiana State Agencies can manage grants that they pursue from pre-award to post-award by creating a project.

Grantor – Persons or organizations that provide grant funding to another party. Indiana State Agencies operate as Grantors when they distribute grant funds to Subrecipients (Grantees). Also, referred to as a Funder.

Grantor Project – A project title is required for each application submitted by an Applicant and an award granted by an Indiana State Agency. The Subrecipient or the Grantor (Indiana State Agency) can edit the project title at any time. The project title is called Project or Project Name in eCivis Grants Network.

Grants Network (GN) – The eCivis name for the software. eCivis also refers to the system as “eCivis,” “eCivis Grants Network,” or “GN.”

Indiana State Agency Lead – A State of Indiana employee in a leadership role within eCivis Grants Network. See Department Master Account Holder (DMAH).

In-Kind Match (Third-Party In-Kind Contribution) – The value of a non-cash contribution (i.e., property or services) that—(1) benefit a Federally-assisted project or program; and (2) are contributed by non-Federal third parties, without charge, to a non-Federal entity under a Federal award ([2 CFR 200.1](#)).

Notice of Funding Opportunity (NOFO) – A formal announcement of the availability of funding through a financial assistance program from an awarding agency.

Organization Funding – Funding opportunities that do not appear in the eCivis Grants Network Search for Grants feature will need to be entered manually as Organization Funding.

Pass-Through Funding – Refers to funding given to a non-Federal entity that provides a subaward to a Subrecipient to conduct part of a Federal program.

Period of Performance (Performance Period) – Time interval between the start of an award and the end date. Referred to also as the Grant Term and Project Period.

Portal (eCivis Grants Portal) – The public-facing portal for Applicants of all Indiana State Agency grant programs released in eCivis Grants Network. URL: <https://portal.ecivis.com/#/login>.

Post-Award – Post-award can be utilized in two aspects of the grant lifecycle, Post-Award Grantee and Post-Award Grantor. See their definitions for more specifics.

Post-Award Grantee – A stage in the lifecycle of a grant after the Indiana State Agency has accepted the award. Components of the post-award process include financial reporting, activity reporting, Subrecipient management, and closeout. See Pre-Award and Pre-Award Grantee definitions too.

Post-Award Grantor – A stage in the lifecycle of a grant after the award has been made to a Subrecipient. Components of the post-award process include status reporting, financial reporting/payment request, payment processing, and closeout. See Pre-Award and Pre-Award Grantor definitions too.

Pre-Award – Pre-award can be utilized in two aspects of the grant lifecycle, Pre-Award Grantee and Pre-Award Grantor. See their definitions for more specifics.

Pre-Award Grantee – A stage in the lifecycle of a grant that precedes the awarding of the grant. Components of the pre-award process include application, application review and evaluation, and application submission to the Grantor (Federal, foundation, etc.).

Pre-Award Grantor – A stage in the lifecycle of a grant that precedes the awarding of a grant. Components of the pre-award process include solicitation setup, application creation, application launch, submitted application review and evaluation, award approval, and award finalization. See Post-Award and Post-Award Grantor.

Program – The release of funds to Subrecipients. Programs are also referred to as “grant programs.” For example, The Office of Community and Rural Affairs releases a grant program to accept applications for the Community Development Block Grant (CDBG) application.

Program Income – Gross income earned by a non-Federal entity that is directly generated by a supported activity or earned because of the Federal award during the period of performance.

Program Manager – An Agency eCivis user that is the first Agency eCivis user to set up a Grantee project or solicitation (Grantor).

Project – See Grantee Project.

Project Lead – The grant program manager or other departmental authority for a specific Grantee project in eCivis Grants Network. Also, Project Lead is referred to sometimes as simply the Lead.

Reviewer – See Evaluator.

Solicitation – The public-facing notification of available grant funding. The solicitation setup in eCivis Grants Network creates either public-facing or internal content, dependent upon program-specific settings. See Notice of Funding Opportunity (NOFO).

State Fiscal Year (SFY) – The 12-month period the State of Indiana uses for financial or budgetary reporting. The SFY begins on July 1st and ends on June 30th.

Subrecipient – An entity that receives a grant from an Indiana State Agency utilizing eCivis Grants Network. Also, it can be referred to as a Grantee of the Indiana State Agency.

Task – A system-generated “to do” that must be completed. Tasks can be manually created, or system-generated as part of a workflow. See Workflow.

Workflow – A series of review and approval activities or tasks that must be completed to accomplish specific parts of the grant process, e.g., State Budget Agency (SBA) pursuance approval or financial reports with/without payment/reimbursement requests from Subrecipients.

Workspace – See Application Workspace and Zengine.

Zengine – The third-party tool used for the configuration of online applications, application review forms, assignment of reviewers to applications, and online review and scoring of submitted grant applications. This is also referred to as the Application Workspace.

Appendix A – Updates to User Guide

August 22, 2024

- **Step 1** - Updated screen shots.
- **Step 2** - New section.
- **Step 3** - Updated screen shots and detailed verbiage added to process description.
- **Step 4** - Updated screen shots and detailed verbiage added to process description.
- **Step 5** - Previous Section 4 was moved here.
Updated screen shots and detailed verbiage added to process description.
- **Step 6** - Previous Section 2 was moved here.
Updated screen shots and detailed verbiage added to process description.
- **Step 7** - Deleted and verbiage used to create a new User Guide.