State of Indiana eCivis Grants Network Grantor User Guide

Application and Score Card Creation

January 2025

Contents

Purpose

The purpose of this user guide is to provide instructions to State Agencies on how to create and edit an application for a program solicitation. Agency eCivis users should have completed *SOI User Guide - Grantor 1. Creating a Solicitation*, prior to application and scorecard creation.

Step 1: Add or Remove Workspace Members

This step is necessary if additional team members will assist in creating the application and/or review form or be responsible for moving applications into the “Awarded” status.

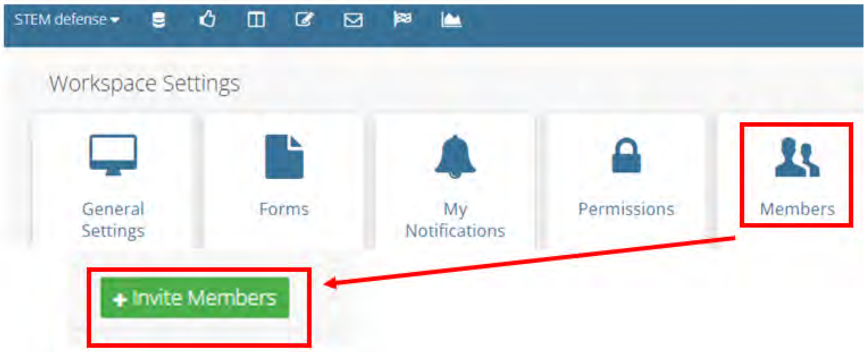
1. On the eCivis Grants Network homepage, the Program Lead will select *Subrecipient Management* from the dropdown menu in the **Grant Management** tab.

2. The Agency eCivis user will be taken to the **Program Dashboard**. Find/Search for the program that requires additional workspace members. Click on the linked title of the program, which takes you to the **Program Detail** page.

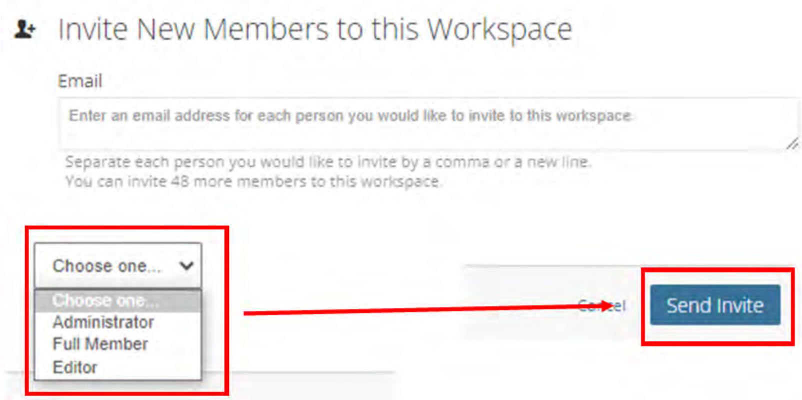
3. Click on *Application Management* then *Application Workspace.* This will open a browser window to log in to the Zengine Application Workspace.

4. Click the *Settings & Tools* gear icon at the top of the page.

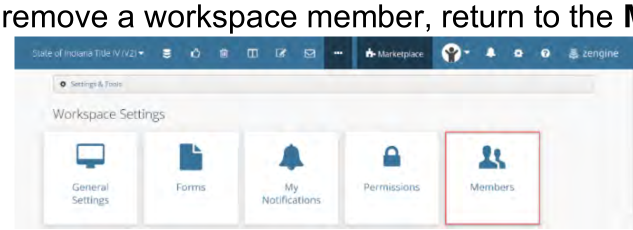
5. Click *Members and then + Invite Members button* to add additional members.



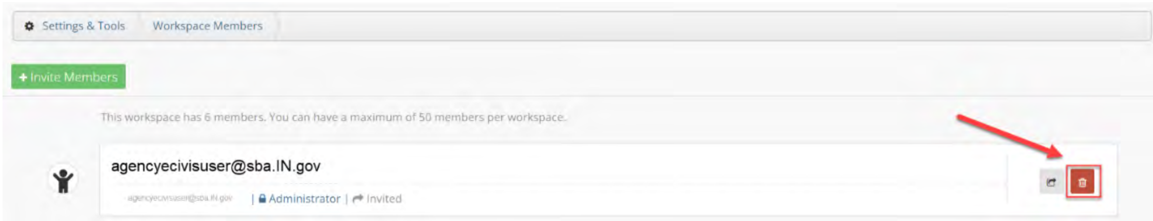
6. The Agency eCivis user will then be prompted to enter the email address and user role of the additional member(s). SBA recommends you choose the Administrator role for all members you add to your Workspace. You can add multiple members by separating the email addresses with a comma. Once complete, click the *Send Invite > button.* You can add a maximum of 50 workspace members for each program.



7. To remove a workspace member, return to the **Members** screen on the **Settings** page.



8. Click the red *Delete Invite > icon* to remove the team member.



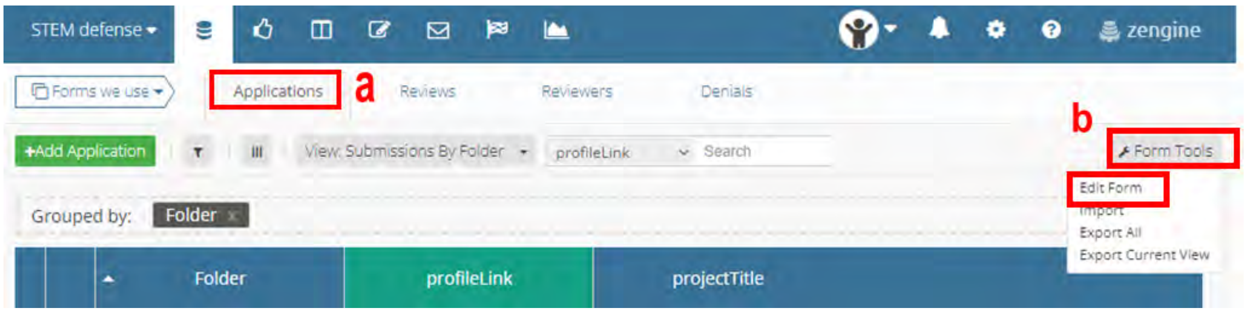
9. A warning screen will appear. Click the *Yes > button* to finalize.

Step 2: Create Application

1. While building an application, custom help text and optional or mandatory fields can be added. To begin building the application, access the workspace by:

a. Making sure you are on the application tab.

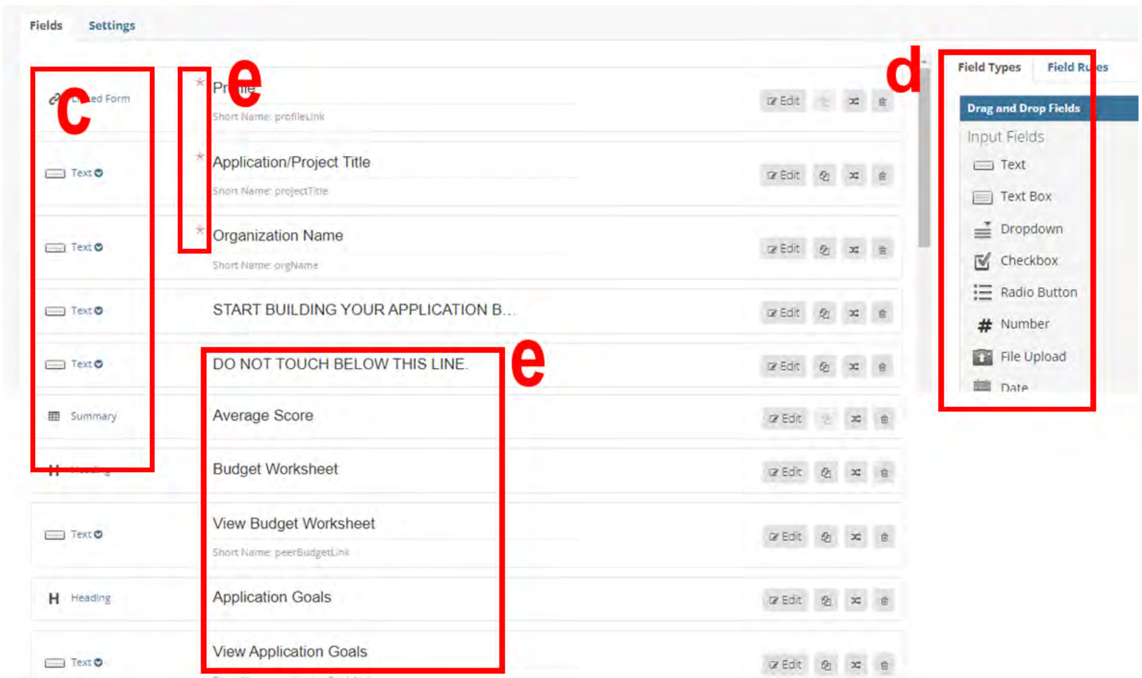
b. Click on the *Form Tools > button* and then from the dropdown menu you will choose *Edit Form*.



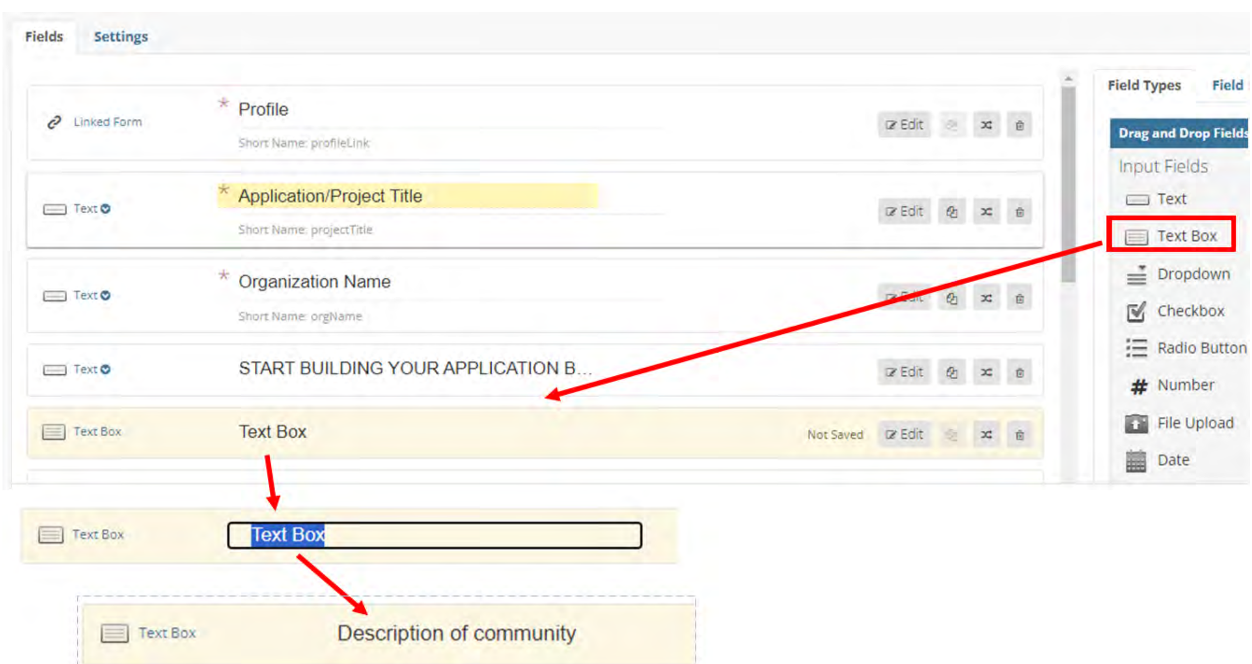
c. Once the application form is open, the Agency eCivis user will see the application fields to the left.

d. On the right-hand side, there are Field Types the Agency eCivis user can choose from to add additional content to their application.

e. The Statewide application fields are marked either with red asterisks and/or with a designated field line stating what lines not to touch, therefore, should not be edited.



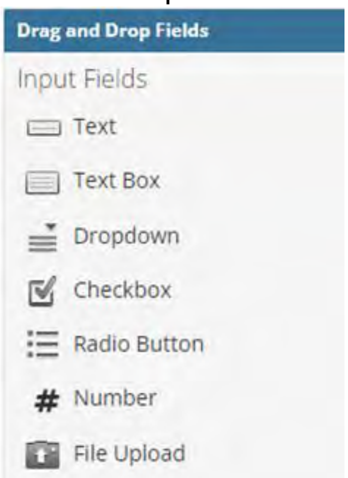
2. To add a field to your application form, the Agency eCivis user will click-and-hold on the desired field they wish to use, drag it over from the field box to the application form and release the cursor. The Agency eCivis user can double click on the field line to edit the title of the field to a title or sentence of their choice.



The following fields can be added to an application:

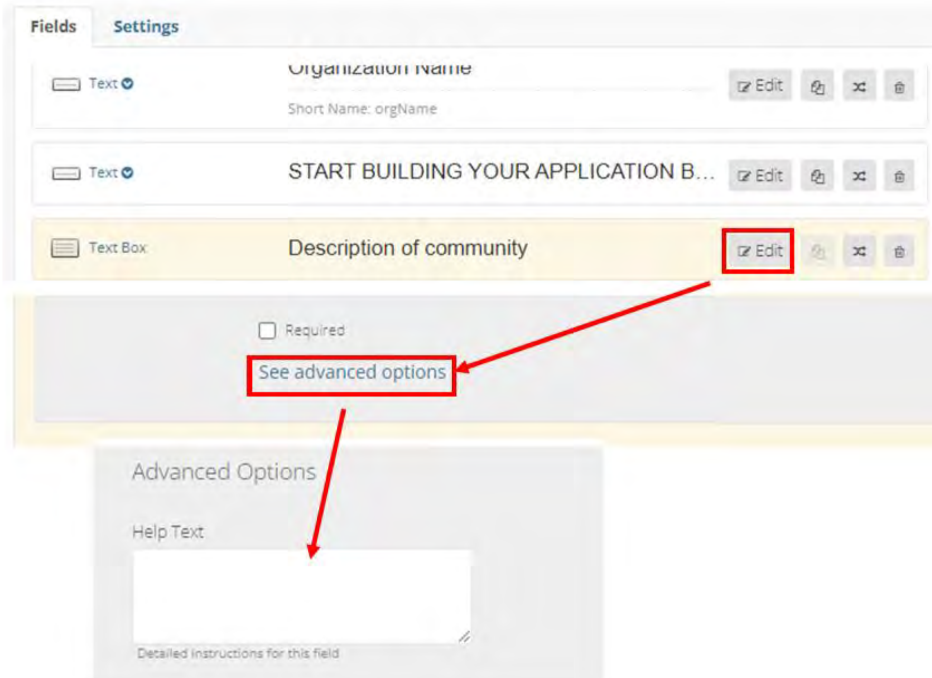
- **Text** - to input a line of text.

- **Text Box** - to input multiple lines of text.
- **Dropdown** - to create a list of options presented as a dropdown.
- **Checkbox** - to create a list of options presented as a checkbox.
- **Radio Button** - to create a list of options presented as radio buttons.
- **Number** - to input of a number, with the ability to add decimal places.
- **File Upload** - to upload documents or media. To make this field required, click the required box. Also allows for the input of a short amount of text.

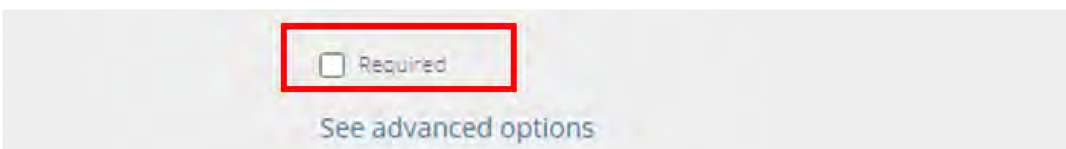


3. The Agency eCivis user can click the *Edit* > *button* and then the *See advanced options* link. Some of the options are generic for all fields and other options are specific for that field type.

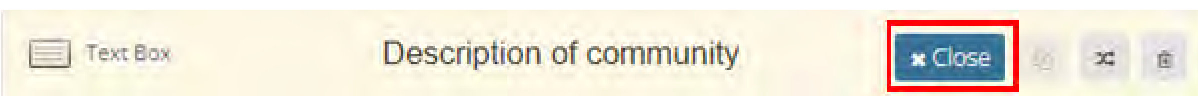
Help Text. Information that can assist the applicant when completing a field in the application. The help text is visible below the question in a smaller font.



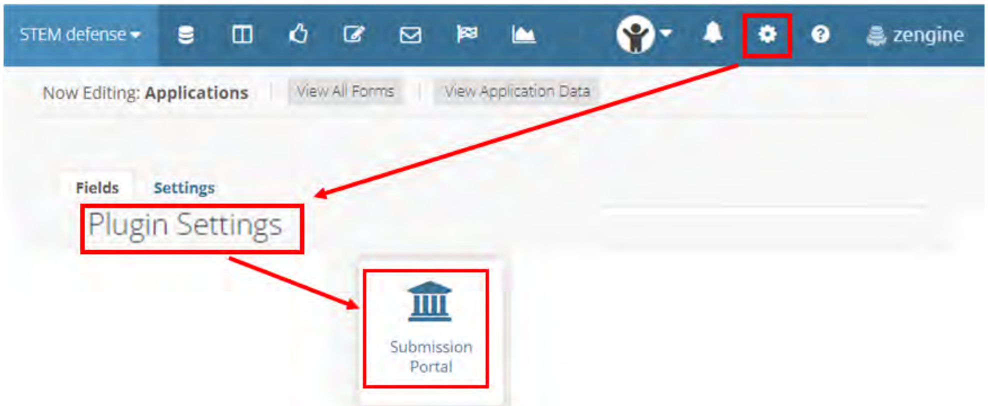
Also, after clicking *Advanced Options*, the user will have the option on every field to make the field Required.



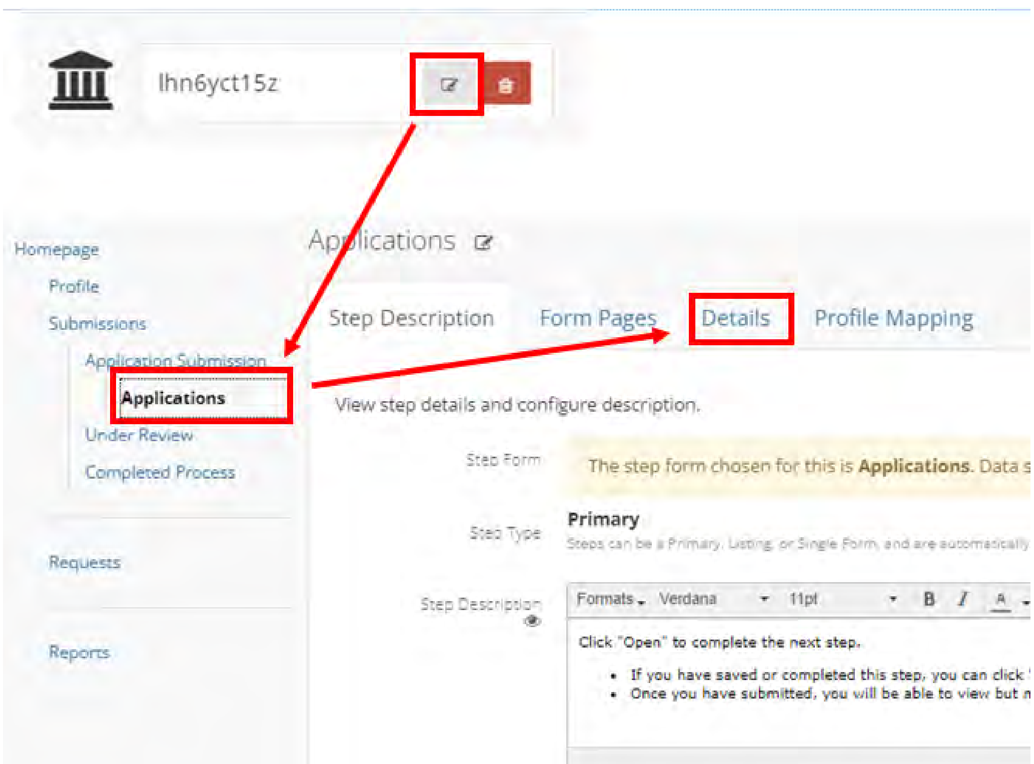
4. When the Agency eCivis user is finished completing any advanced option settings, the User will scroll to the top of the field and click the *Close* > *button*.



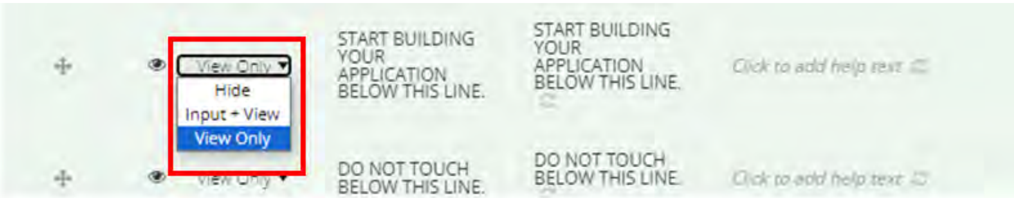
5. All fields that are added by the Agency eCivis user are, by default, hidden from the applicants' view until the Agency eCivis user configures the field for input or input + view. To update the configuration, the Agency eCivis user will click the *Settings & Tools icon*. In the ***Settings & Tools*** page, navigate to the **Submission Portal**.

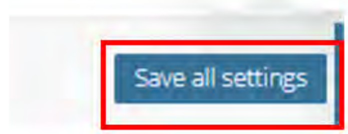


6. At the right of the screen, click the *Edit Submission Portal icon,* then in the **Edit Submission Portal** screen, click on *Applications* > link on the Portal Sections to the left of the screen. Within the **Applications Step Settings**, click on the *Details* tab.



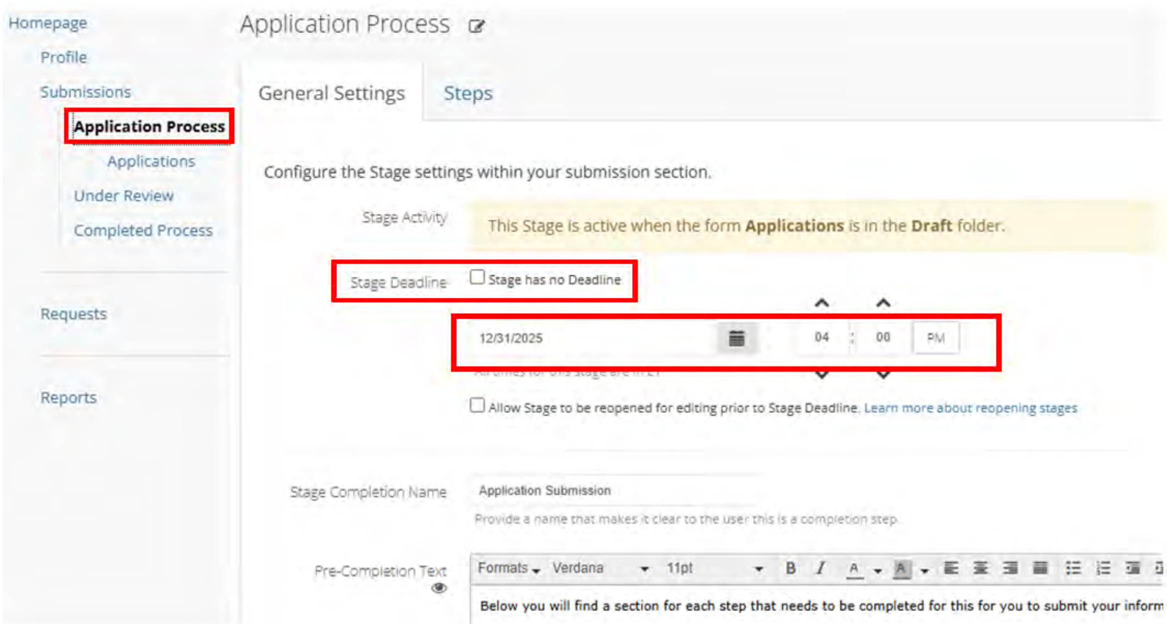
7. In this screen, each application entry will have a corresponding row. The second column allows Agency eCivis users to set the “view” setting for this field. For fields Applicants need to fill out, change this setting to “Input + View”. For fields like Headings and Presentational Text, you will choose “View Only”. Please do not change the selection for the State standard template fields. Click *Save All Settings > button* when complete.


View Only
Hide
Input + View
View Only
START BUILDING YOUR APPLICATION BELOW THIS LINE.
START BUILDING YOUR APPLICATION BELOW THIS LINE.
Click to add help text
DO NOT TOUCH BELOW THIS LINE.
DO NOT TOUCH BELOW THIS LINE.
Click to add help text


Save all settings

Step 3: Adjusting Application Submission Deadlines

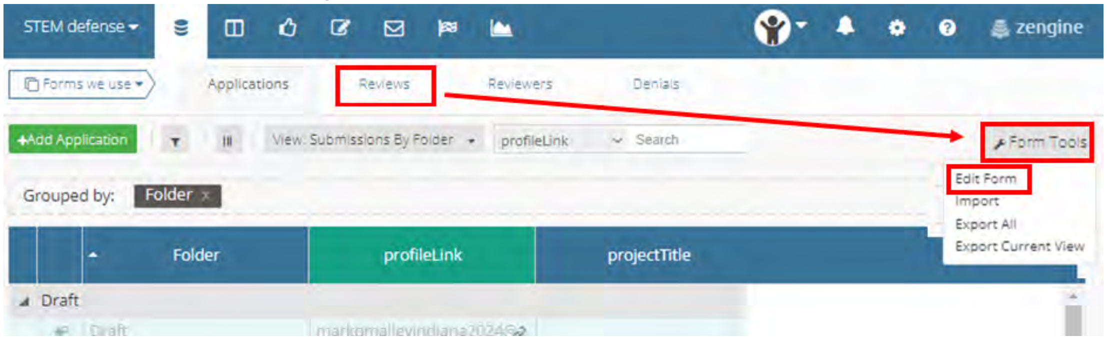
If a change to the application submission deadline you requested in the Solicitation is desired, click on *Application Process* link to the left. Within the **Application Process** screen, uncheck the **Stage Deadline** checkbox. From there, edit the date and/or time as appropriate. The State of Indiana preferred timing for the application submission deadline is no later than 4:00 PM on a workday. The time zone for all deadlines will be in EST. The time of day is not displayed in the Solicitation. The Agency eCivis user should provide the time in the program solicitation in the **Overview** tab. Please see *SOI User Guide - Grantor 1. Creating a Solicitation* for more information about editing a solicitation.



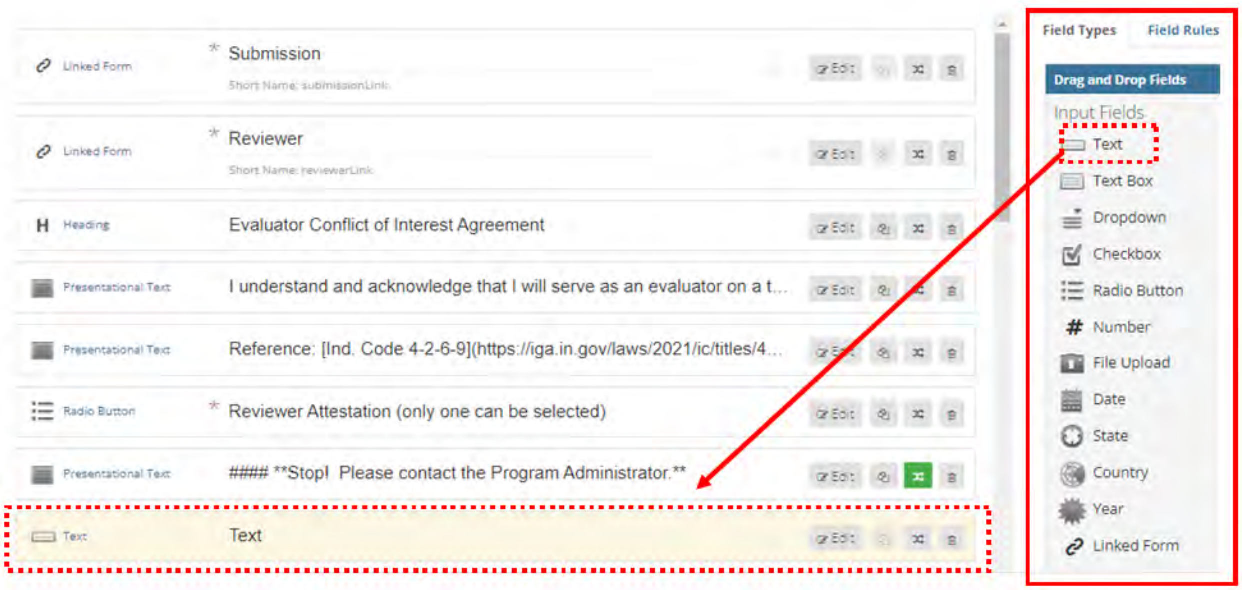
Step 4: Create Scorecard

The review scorecard can be edited to best serve a program's application.

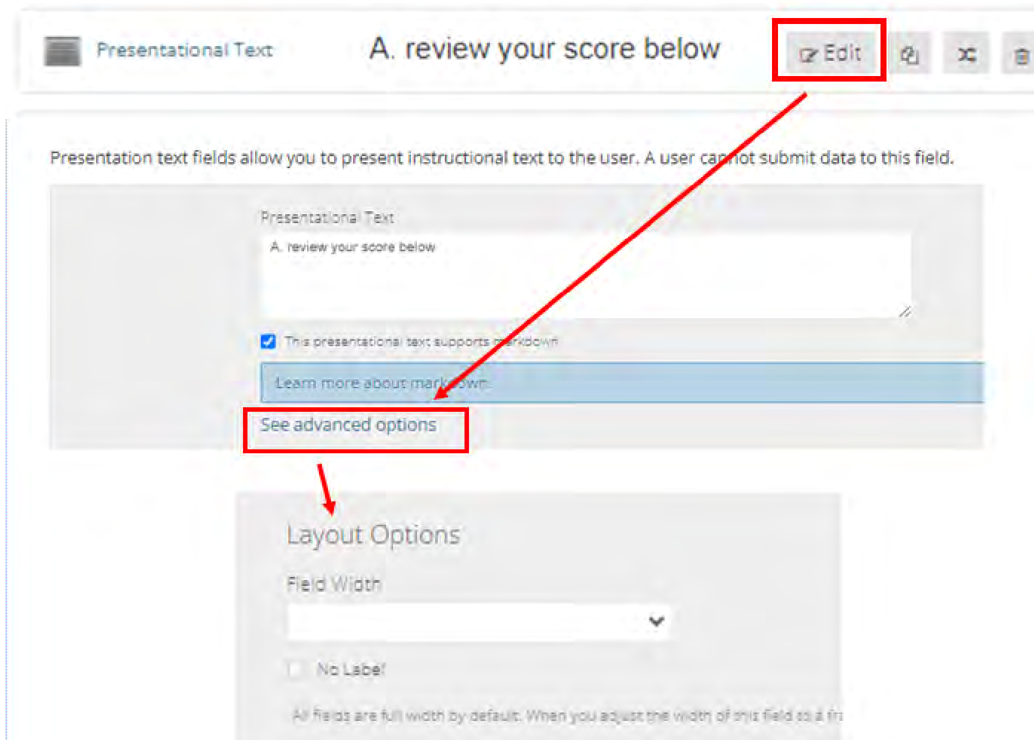
1. To access the review scorecard form, click the *Reviews* tab at the top of the page. On the right side of the page, click the *Form Tools > button* and then click on *Edit Form* from the dropdown list.



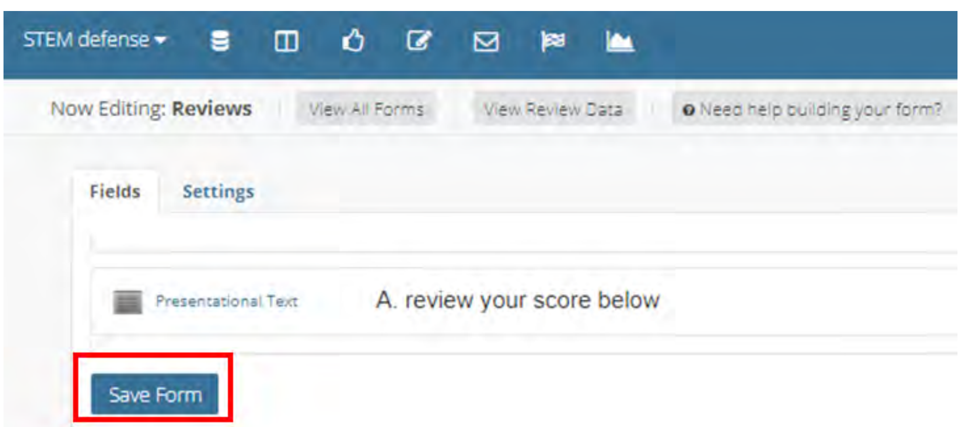
2. This will display the field types for the review form, which are the same as the application field types.



3. The User can click the *Edit > button* and Click *See advanced options* to adjust the fields to their liking.



4. To add additional fields, refer to *Step 2: Create Application*, as the process is performed the same way. Click the *Save Form > button* after completing all desired edits.



Below is an example of a Review Scorecard. Each field is weighted equally, with a numerical score determining the strength of that field. A higher score indicates a stronger response from an Applicant.

The following table displays the meaning behind the scores.

Review Scorecard

Title	Definition	Score
Clearly Defined	The field is adequately addressing all required information.	8 - 10
Somewhat Defined	The field addresses some of the required information.	5 - 7
Not Clearly Defined	The field narrowly addresses the required information.	1 - 4
Not Defined	The field does not address any of the required information.	0

Examples of fields to use within Review Scorecard:

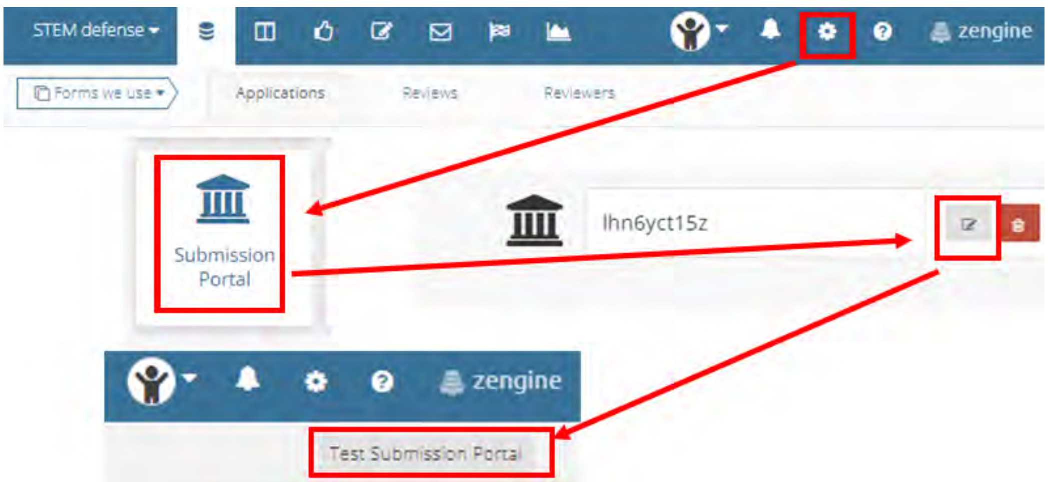
Application Fields	Scoring Range
Project Narrative	0-10
Project Narrative #1	0-10
Project Narrative #2	0-10
Application Fields	**Scoring Range**
Project Narrative #3	0-10
Project Timeline	0-10
Organization Demographics	0-10
Target Populations Served Demographics	0-10
Project Goals and Objectives	0-10
Collaborative Elements and Partners	0-10
Sustainability Plan	0-10
Evaluation Plan	0-10
Monitoring Plan	0-10
Program-Specific Criteria #1	0-10
Program-Specific Criteria #2	0-10
Program-Specific Criteria #3	0-10
Program-Specific Criteria #4	0-10
Program-Specific Criteria #5	0-10

Step 5: Testing the Application

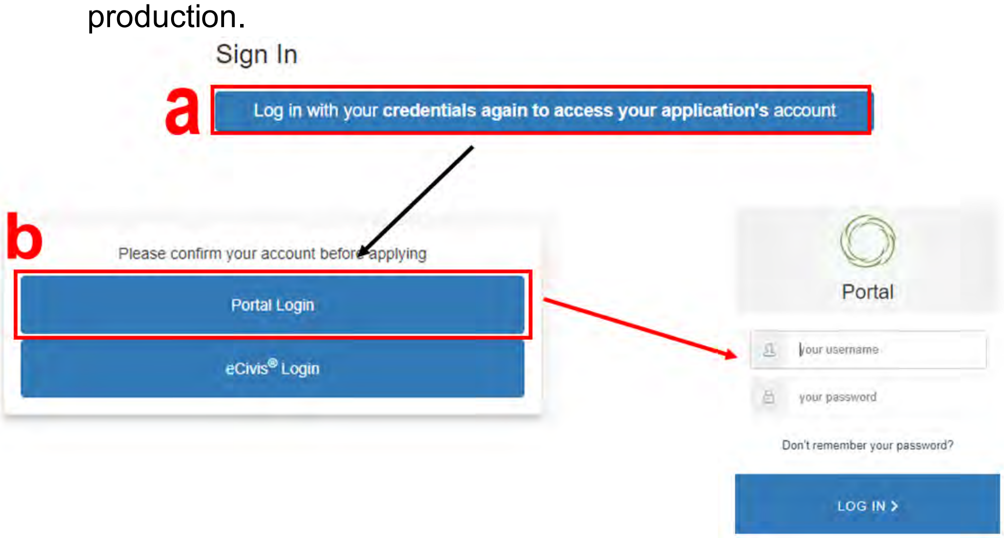
Before the program solicitation is published, the application should be tested by the Agency eCivis user.

Viewing the Application from the Applicant's Point View

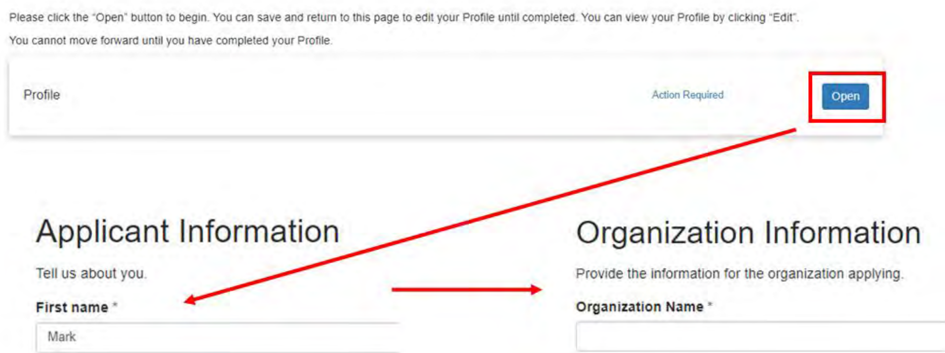
1. To view the application from the Applicant's point of view, the Agency eCivis user will need to navigate to the Submission portal by clicking the *Settings & Tools icon*. In the **Settings & Tools** page, navigate to the **Submission Portal**. At the right of the screen, click the *Edit Submission > button*. In the **Edit Submission Portal** screen, click on the *Test Submission Portal > button* at the top right. This will allow the Agency eCivis user to view the application as if they were applying for the grant.



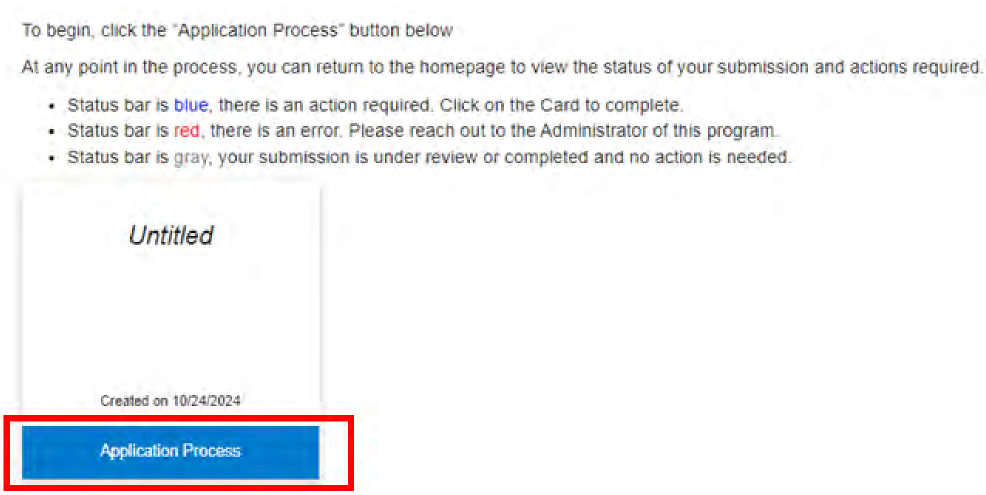
a. The Agency eCivis user will be taken to the **eCivis Portal** and asked to click the *"Log in"* blue button.
b. The Agency eCivis user will click on the *Portal Login* and put in their username and password to access the portal. If this is your first time logging in, you will need to create an account. You will not be able to use your State email address, as that already exists using a single sign-on method for eCivis production.



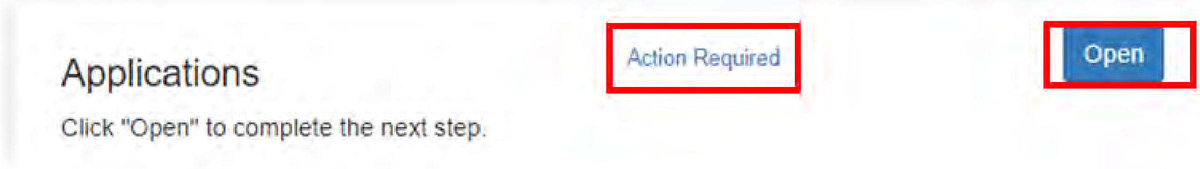
2. Click the *Create a Profile to Get Started* link. Fill out the *Portal* profile and click the *Open > button* on the profile section. Each application has its own profile associated with it. If your application allows a single applicant to apply more than once to your program, the applicant will only fill out the application profile once. SBA recommends that you add profile questions to your application to distinguish between the application submissions.



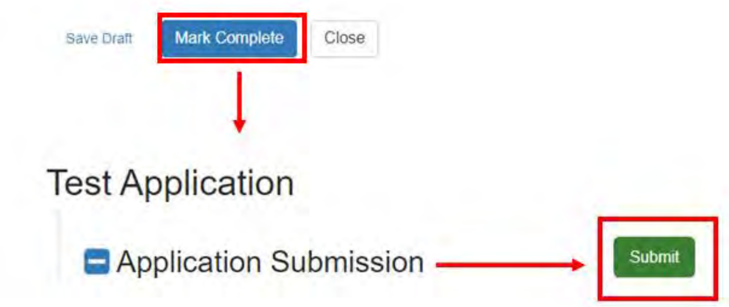
3. The Agency eCivis user can access their portal account and their application anytime they wish by clicking on the Application Process blue bar after accessing their Portal account.



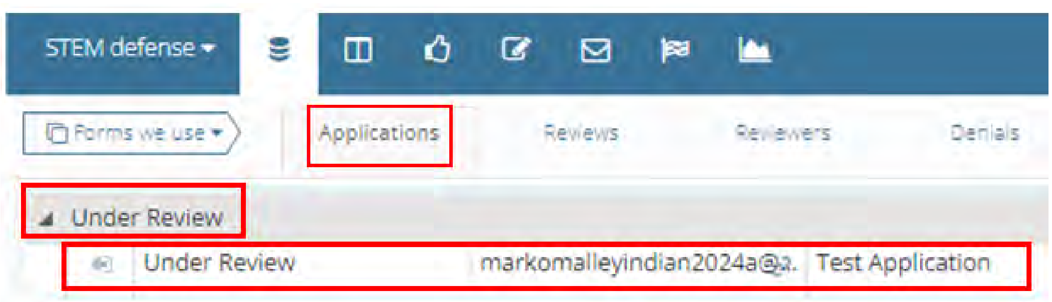
4. Once the Agency eCivis user completes the profile, the User can click the *Open > button* to begin filling out the application. There will be an "Action Required" status indicator that will remain until the application is completed in full.



Once the Test Application is complete, the Agency eCivis user will click the *Mark Complete > button*. The Agency eCivis user will click the *Green Submit > button*, that will now be visible, since the application was Marked Complete.

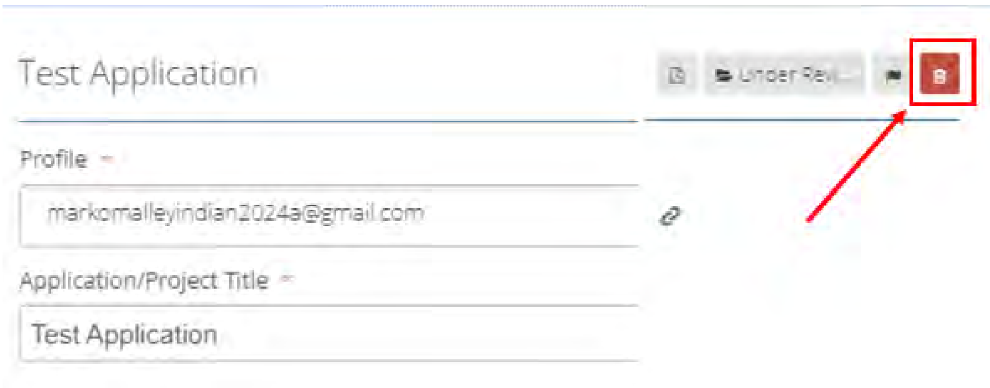


5. Once the *Submit > button* is clicked then the Agency eCivis user will be able to see the test application in the **Under Review** folder on the **Applications** tab in Zengine.



6. As you are testing your application in the eCivis Portal, you can adjust your application in Zengine. Refreshing the Portal browser window will allow you to see the changes that are being made in Zengine immediately. SBA recommends that you keep your application in draft until you have tested all fields.

7. After you have completed your testing of the application, you can delete the application in Zengine if desired. Click anywhere on the row of your application to bring up the form. Click on the red *Trash Can* icon to delete. You will still have a profile and potentially a Budget, depending on whether you filled out a budget or not. If you wish to delete those you must start with the Budget first. Please reach out to SBA for assistance with this process.

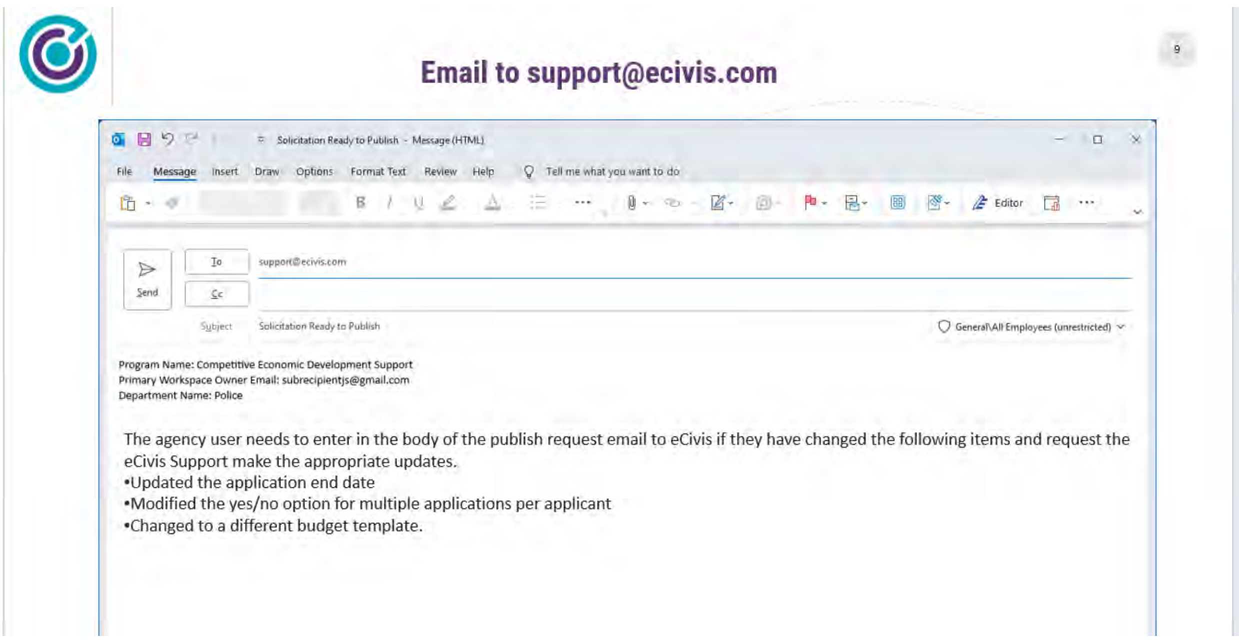

Test Application
Under Revi...
Profile
markomalleyindian2024a@gmail.com
Application/Project Title
Test Application

Step 6: Publishing the Application and Solicitation

1. Once the application is completed in Zengine, it will be time to publish the Solicitation, which includes the Application and Scorecard, if created.

2. The Agency eCivis user will create a new email addressed to support@ecivis.com letting eCivis know they are ready to publish their solicitation. Please include the information below.

   a. Name of the Program
   b. Primary Workspace Owner Email
   c. Department Name
   d. The application end date and time in EST
   e. Whether you are allowing an applicant to submit multiple applications
   f. The budget template you chose



3. The application will then be live on the requested date.

NOTE: the Publish process takes eCivis up to 2 business days to complete.

Conclusion

Once the solicitation and application are published, and the specified Application Start Date has passed, Applicants can begin submitting applications to the program. The *SOI User Guide - Grantor 3. Review and Evaluation* details the processing for assigning evaluators and application reviews.

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.

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.

Default Application Fields – Provided grant application fields for Indiana State Agency grant programs. These fields can be edited or hidden. Additionally, grant application fields can be added (if needed) by the Agency eCivis user under the Default Application.

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 Grants Network – The grant management system created by eCivis for State Grantees/Grantors.

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.

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.

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

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*.

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.

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.

Scorecard – A scorecard is a form a reviewer will use to numerically score an application. A scorecard will consist of multiple fields to evaluate an application and an accompanying numerical value to measure the strength of that field.

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).

Statewide Application – The grant application fields established by the State Budget Agency (SBA) that are included as part of all Indiana State Agency grant programs. These fields are to remain intact for all grant programs and should not be edited and/or deleted. Only one field is required, Project Narrative, which Indiana State Agencies will need to direct their Applicants on the specific use of e.g., Executive Summary, Project Narrative, etc.

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

<u>August 22, 2024</u>

- Step 1 - Updated screen shots and detailed verbiage added to process description.
- Step 2 - Updated screen shots and detailed verbiage added to process description.
- Step 3 - New section, new screenshots, and added verbiage to describe process.
- Step 4 - Previous Section 3 in the previous guide.
  Updated screen shots and detailed verbiage added to process description.
- Step 5 - New section, new screenshots, and added verbiage to describe process.
- Step 6 - Previous Section 5 in the previous guide.
  Updated screen shots and detailed verbiage added to process description.