State of Indiana eCivis Grants Network Grantor User Guide

Application Review Management
January 2025

## Contents

Purpose

The purpose of this user guide is to provide instructions to State Agencies on the eCivis application reviewer functionality. Agency eCivis users managing a program solicitation with applications will utilize these features.

Step 1: Reviewer Portal After Publishing Grant Program

After emailing support@ecivis.com to publish a grant program, an email will be sent notifying the Agency eCivis user that the grant program is available. This email will also include a link to access the reviewer portal. Once reviewers and their corresponding applications are assigned, the provided Reviewer Portal link can be distributed to begin the evaluation process.

Hello,

Your program, Indianapolis Airport Unite has been published!
You may also access the solicitation on your Organization Programs page in Grants Network.

When you are ready to review applications, here is the link to grant access to the review portal: https://webportalapp.com/portal/applications_9630

The default application deadline is the date you specified with an end time of 11:59pm EST.

Please let me know if you have any other questions.

Best,

Alan Gamboa-Saucedo
Technical Support Representative I

Alan.Gamboa@eunasolutions.com

EUNA solutions

Step 2: Adding or Removing Reviewers

1) On the eCivis Grants Network homepage, the Agency eCivis user will select *Subrecipient Management* from the dropdown menu in the **Grant Management** tab. In the *Subrecipient Management* page, navigate to the **Program Solicitations** table at the bottom of the **Program Dashboard** screen. In this table, click on the title of the program solicitation that requires an evaluation.


2) In the appropriate program page, click *Edit Solicitation and* then the *Review* tab. This is the page where the Agency eCivis user can add or remove reviewers. To review how to add and/or remove reviewers visit the Grantor User Guide 1. Creating a Solicitation.

Step 3: Giving Access to the Review Portal to Reviewers

The Zengine Application Workspace needs to be accessed to manage application assignments to reviewers. Before applications are assigned for review, the workspace manager will need to send the review portal link to the review committee so they can create a profile. First, in Zengine, go to the *Settings & Tools* icon in the top right corner of the blue ribbon. Then click on the *Review Portal* icon under the *Plugin Settings* section. Click on the *Edit* icon to go to the **Settings Page**, which will have the URL link for the review portal each of your members will need.
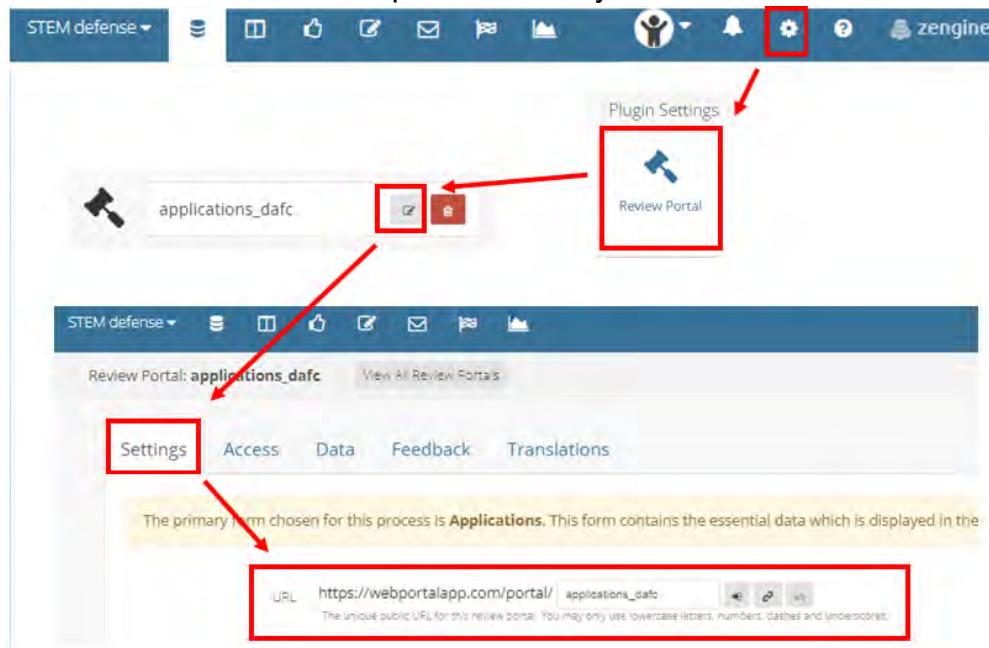
1) Copy the portal link by clicking on the Link Icon. When the URL window appears, press the CTRL+C to copy the URL to your clipboard.
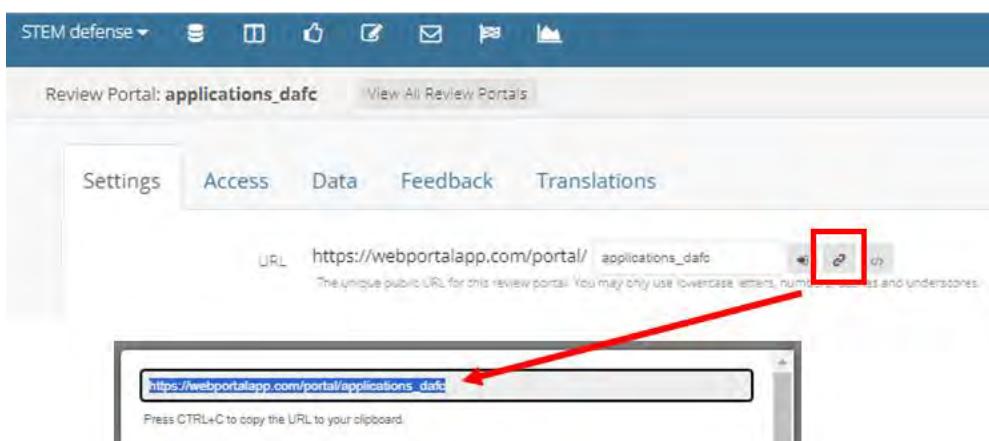
Once the review portal link is shared with reviewers, a profile can be created for the Reviewer. The Reviewer will put in their email address to begin the process. If the Reviewer is one of the people designated in the solicitation, then a green indicator will

appear describing the confirmation process. If a red message appears, the Reviewer should carefully check the spelling of their email address or contact the program manager to make sure the review committee list has the correct email address spelling.

A screenshot of the confirmation email sent to all reviewers is below. When the reviewer clicks the confirmation link, a window will pop up prompting the user to create a password. Once the password for the review portal is created, the Reviewer clicks the Create Account button, which takes them to the Review Portal. The Reviewer won't have any applications assigned to them yet. The process described above is prior to the Agency eCivis user assigning Reviewers applications.

If the application manager waits to give access to Reviewers after applications are assigned, the confirmation email will be the same except a confirmation code will be included in the confirmation email.
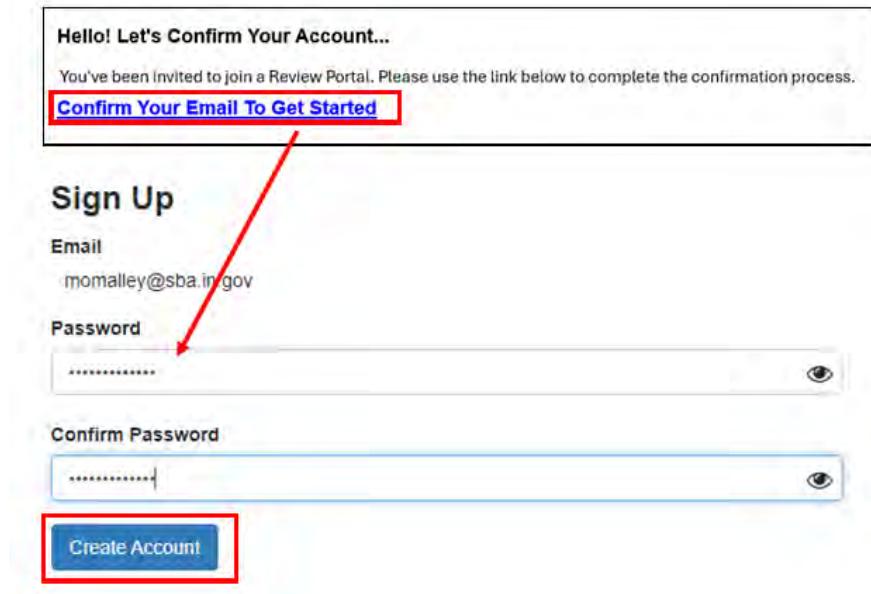
Hello! Let's Confirm Your Account...

You've been invited to join a Review Portal. Please use the link below

Confirm Your Email To Get Started

Account   momalley@sba.in.gov

Confirmation Code   e2dcf718

Once the Reviewer has completed the log in process and if the applications were already assigned, the Reviewer will be automatically taken to a review portal with the assigned application(s) waiting for them to review.

1 listing in total   Show: All

caitlin clark   Review

|◄ ◄   1 / 1   ► ►| 1 - 1 of 1

Step 4: Assigning Applications

You assign applications for review in the Zengine Workspace. Click on the *Subrecipient Management link* to be taken to the **Program Dashboard**. The Agency eCivis user will need to scroll down to the Program Solicitation list and find the appropriate Solicitation link. After the **Program Detail Page** appears, under the Application Management tab, click on the *Application Workspace link*.

1) Click the *Program Manager & Assignments icon*. When the Assignments dashboard appears, the Zengine User will click on the *Edit Assignments > button*.

2) On the following page, the Zengine User will need to designate the appropriate review method and assign applications by submission, submission group, member, or batch assign. Click on the assign drop down box and select the review method.
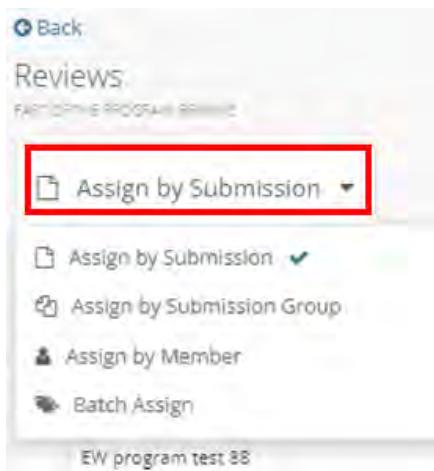
a. **Assign by Submission-**This is a manual assignment based on an application submission. The Zengine User selects a *Submission* and then clicks *Assign* to add a single reviewer to the assignment list.

b. **Assignments by Submission Group-**This is a manual assignment based on a previously created submission group. This submission group can include multiple reviewer team members and can have a specified reviewer workflow. The Program Manager can then select a submission group and then click *Assign* to add members within that group to the assignment.

c. **Assign by Member-**This is a manual assignment based on the review team member. The Program Manager selects a *Member*, then clicks *Assign* to add a single Submission to the assignment list.

d. **Batch Assign-**This is a random assignment based on criteria specified in the batch assignment process. The Program Manager must specify whether these random assignments will be made based on the submission, member, or submission group. Then input the number of entries that will be assigned and choose to limit these assignments to specific reviewers. Once this information is provided, click *Assign*.

The assignment dashboard is always a live update of the status of any/all applications. In the example below you can see:

a.) **CC program test 88 application** has two reviewers assigned to it. One reviewer completed their review. The second reviewer still needs to complete the review process, so the *% completed* of this application review is 50%.

b.) **EW program test 88 application** has no reviewers assigned to it yet. No reviews have started so the review *completed %* is N/A.
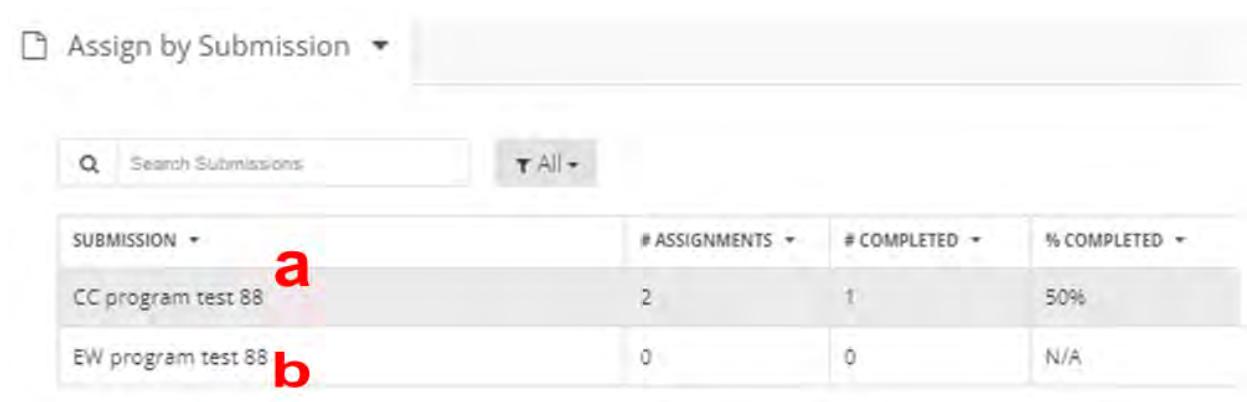
As an example, to assign an application by submission, the Zengine User must click anywhere on the application line.
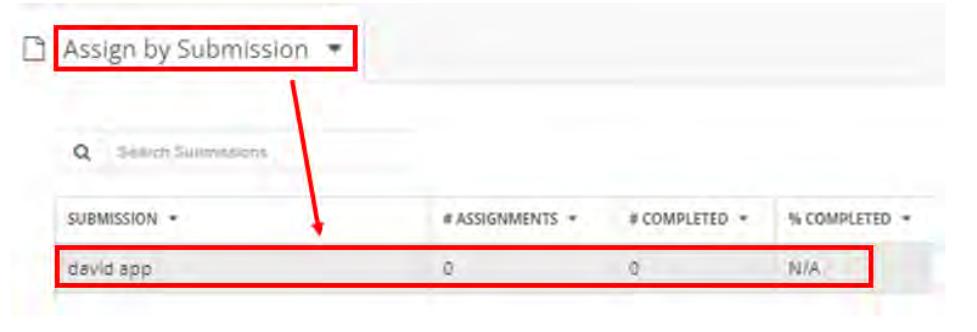
An assignment box will appear, and the Zengine User will click the green Assign button. All the reviewers on the review committee will be shown. Select the appropriate reviewer to assign to the application.

The application assignment is real-time, so the application status can be viewed after the assignments are given. Just click on the Application Line and the status can be seen.

david app			Assign ▾
MEMBERS (1)	STATUS	ASSIGNED	
omalley , mark	○ Not Begun	Manually	✖

Step 5: Reopening an Application to Draft Status

If an application is submitted but needs to move back to draft status, the Zengine User can click on the application line that needs to be re-opened.
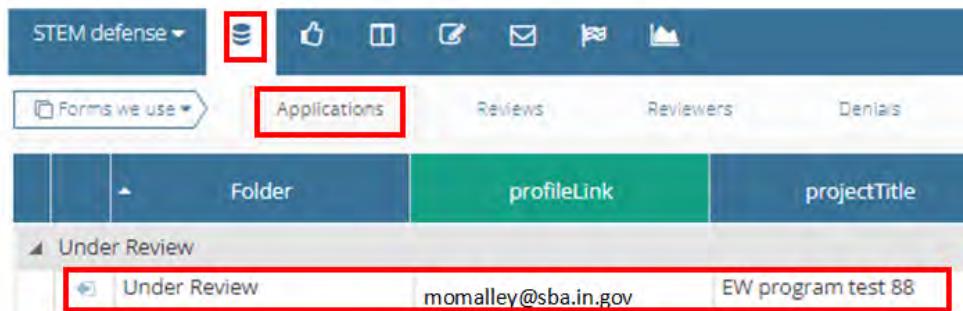
1) Once the Application Window pops up, the Zengine User will click on the Application Status button. From the drop-down menu, the Zengine User will change the application from Under Review to Draft.
Click the *Save > button* at the bottom left hand of the application window.

2) The Zengine User will click the data stack to refresh the main application page; the re-opened application will now appear in the **Draft Section**.
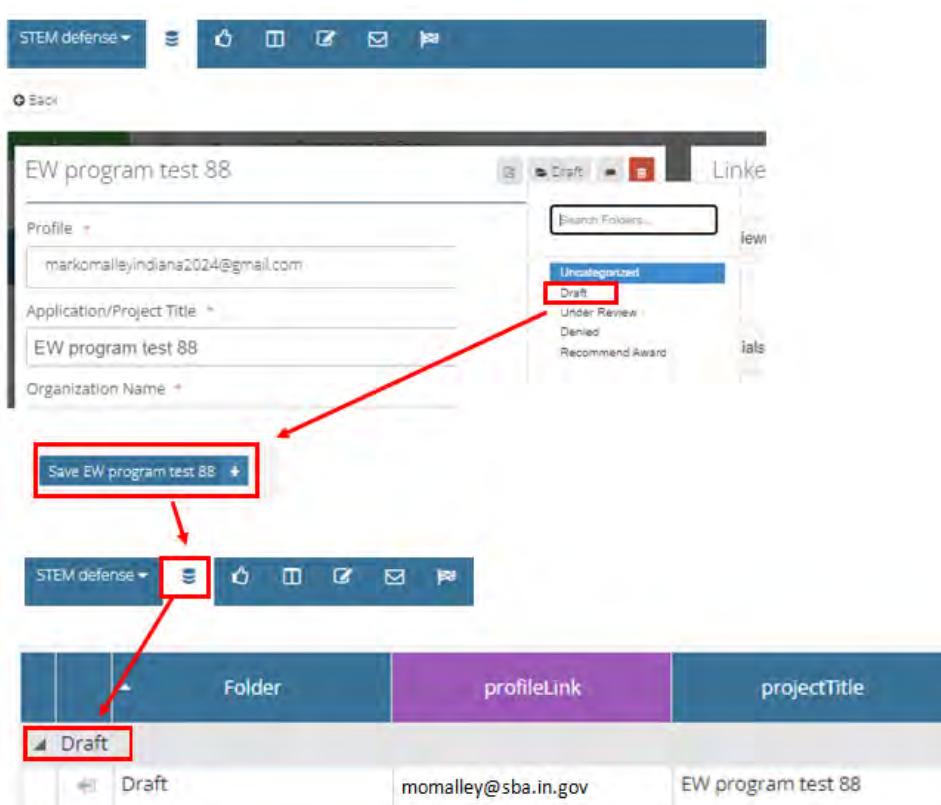
Step 6: Review Feedback & Scores

There are two primary forms where the Agency eCivis user can check other reviewers' application feedback and scores. Click on the *Reviews* tab. This form contains the feedback and scoring submitted by the reviewer for each application they were assigned.
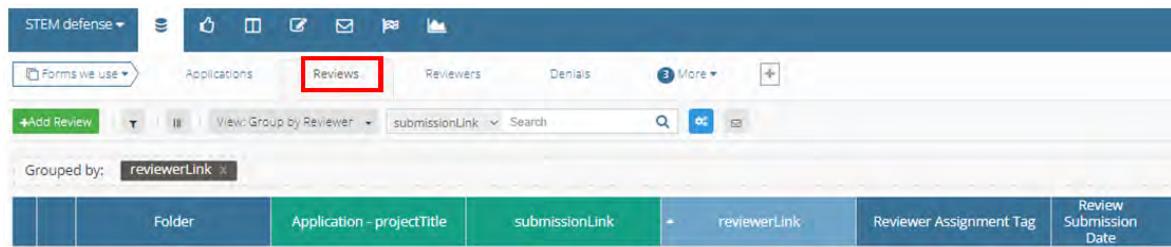
1) The default view groups reviews by reviewer. To change the view, click on the *View* dropdown menu and select the desired view.
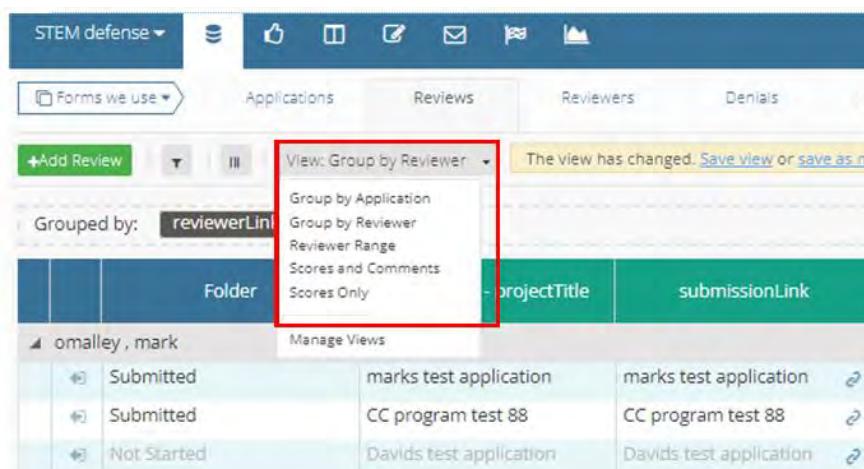
2) To view the applications by reviewer, Select Group by Reviewer. All applications will be sorted by reviewers in folders. All feedback and scoring will be displayed in each application row.

3) There are additional fields that you can add to your view. Choose the column icon, as shown below, and select the fields you want to add to your view. You can save this as a new view or update the current view with these additional fields.

4) To show the total score for an application, the Zengine User will need to click the Column Icon and scroll to the bottom of the list, select Total Score. This will now appear as the last column of the view.

5) Views in the Zengine Workspace can be saved by clicking the fields you wish to display from the column icon.
   a. When all the fields have been chosen, click the Save View link.
   b. If the Zengine User wants this view as an additional view, click the Save as New View link.
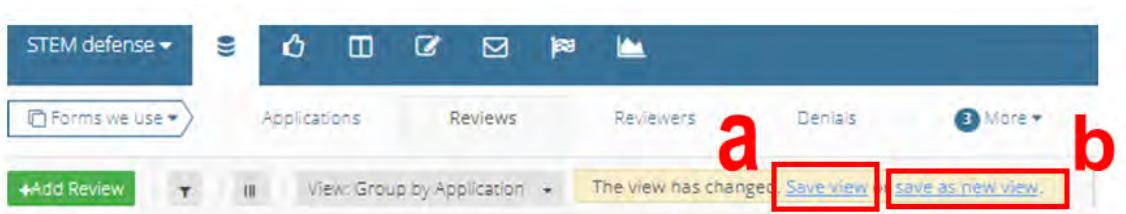
Choose and type a name for the new view and then click the Save button. The new name will now be in the drop-down box.

6) Another option is to review by applications. The Zengine User will go to the View drop down box and click on the Group by Application link.

7) The application view screen will appear. They can be sorted by clicking on the desired column header. The Zengine User can click on the Folder Column header and all the applications will be sorted based on "Submitted" or "Not Started" status.

	Folder	Application - projectTitle	submissionLink	Reviewer Assignment Tag	Total Score
	Submitted	test application DINA 230	test application DINA 230	type:individual	20
	Submitted	marks test application	marks test application	type:individual	100
	Submitted	CC program test 88	CC program test 88	type:individual	90
	Not Started	test application 4.11	test application 4.11	type:individual	
	Not Started	Davids test application	Davids test application	type:individual	
	Not Started	Davids test application	Davids test application	type:individual	

Step 7: Zengine Email Functionality

In Zengine, there is an email function that the Zengine user can use to send out bulk emails for Denials or to send a message to all, or a select few, applicants that have their application in at least the Draft state, regarding important updates to the program during the submission window. On the Data Page in Zengine, there are two email icons the Zengine User can click to use the email function. Even though the icons have different names, **they are the same tool**. One is the Bulk Email icon and the other is the Email icon.

The Budget Agency does not recommend using this feature to email and inform applicants of their final award decisions, this step is completed in eCivis.
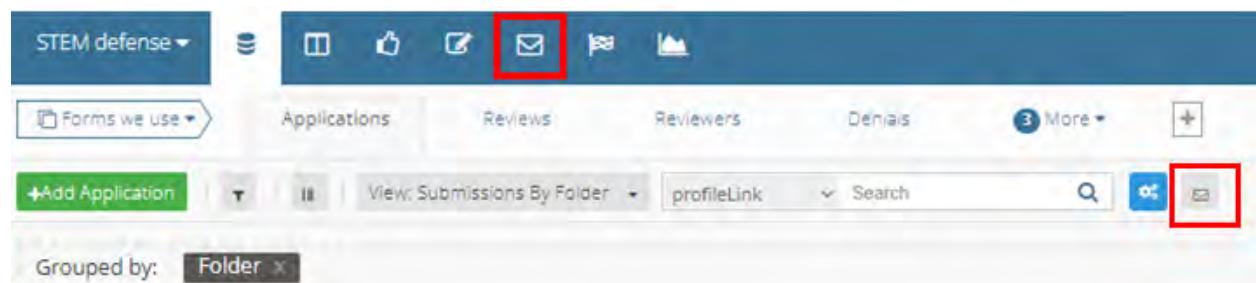
For instance, if the Zengine User wanted to contact all the reviewers:
1) The Zengine user will navigate to the homepage and click the Email Icon.
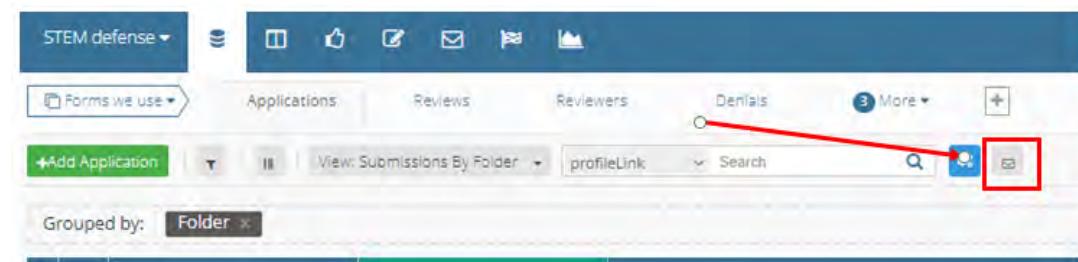
1) The **Email** page will appear.
    a. In the Recipients Form drop-down, you will select who you want the email to go to. In this example, we want to contact the reviewers.
    b. Select the email address for recipients in the "Email Field" drop-down.
    c. The Filter Recipients button can help the Zengine User narrow the recipient list based on field categories. This is not required to use in all cases.
    d. Add a "From Name," "Reply To" email address, "Subject," and "Body" of your email:
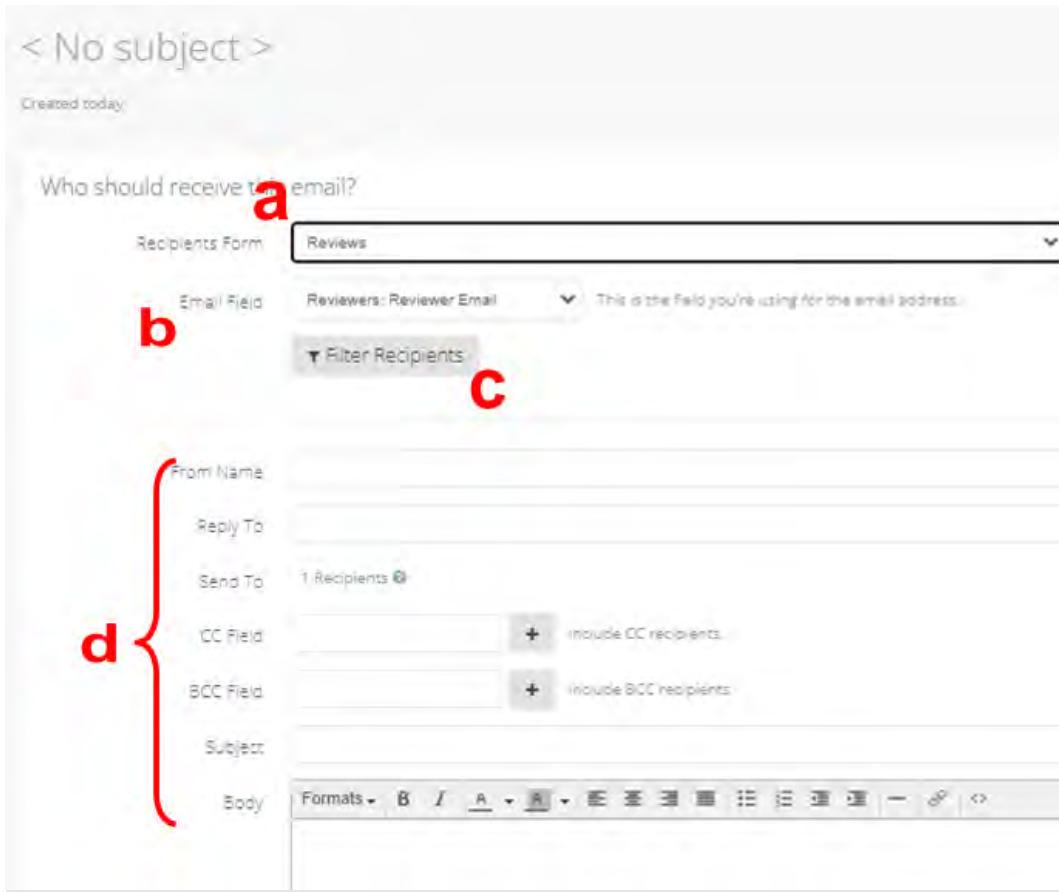
2) Once the email draft is complete, the Zengine User can either Preview, Schedule, or Send the email by clicking the corresponding buttons at the bottom of the email text box.
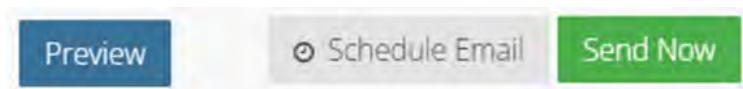
3) Once the bulk email is sent it will appear in the **Sent** tab of this section.
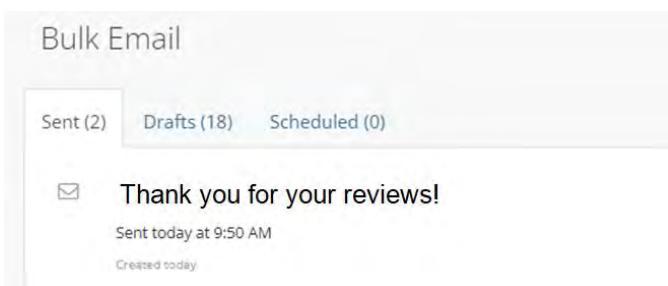
Conclusion

After managing the review process for all applications, the Agency eCivis user can begin the Approval and Denial Process for all applications using *User Guide – Managing Application Denials & Approvals.*

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.

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.

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.

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.

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.

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.

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

Reviewer – See Evaluator.

Reviewer Portal – The eCivis Portal Evaluators will log in to access their assessments and application reviews.

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).

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
- **Step 4-** Previous Section 3 was moved here. 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 5 was moved here. Updated screen shots and detailed verbiage added to process description.
- **Step 7-** New section