



State of Indiana Euna Grants Network Post-Award User Guide

Grant Awarded through Grant Implementation Award Management July 2025

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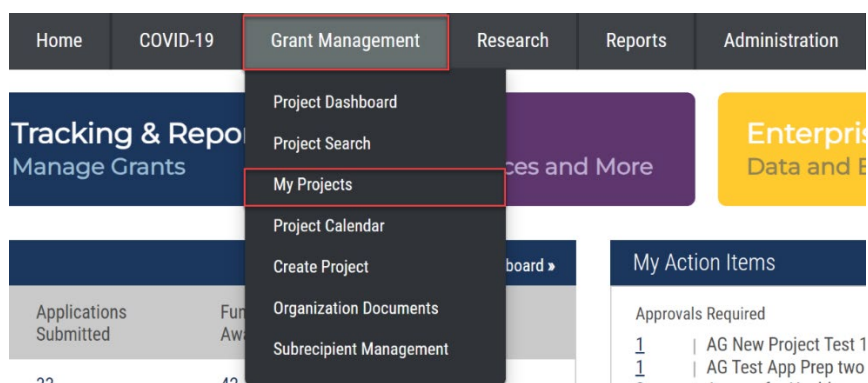
Purpose

The purpose of this user guide is to provide specific instructions to Indiana State Agencies managing awarded grants in Euna Grants Network. These steps will allow Agency Euna users to process award notifications and amendments, obtain Funding Source Numbers/IDs, create and complete tasks, and set approval groups.

Section 1 – Updating Grant Status to Grant Not Awarded

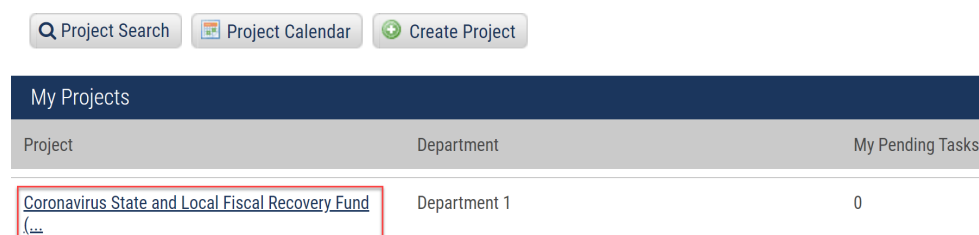
Once the Agency Euna user receives a notification from the funding agency/funder that the Agency was not awarded, the Agency Euna user can update the grant status in Euna Grants Network. The grant status must be updated using the following steps:

- 1) On the Euna Grants Network Homepage, the Agency Euna user will select *My Projects* from the **Grant Management** tab.




- 2) From the list, click the name of the Euna Grants Network project to be updated.

My Projects



- 3) On the **Project Dashboard**, under the *Available Actions* list, select *I have received notification that I have not been awarded*.

Overview	Documents	Grant Lifecycle	Goals & Metrics	Budgets	Contracts & Accounts	Spending	History
Active Grants  US17341 Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021					Project Team  Project Lead (Lead)		
Stage: App. Submitted		Projected: \$80,000,000.00		Match: \$0.00		Agency eCivis user	
Available Actions <ul style="list-style-type: none"> <input type="radio"/> I would like to access details of this grant <input type="radio"/> I have received my award notification and I have been awarded <input checked="" type="radio"/> I have received notification that I have not been awarded <input type="radio"/> I need to resubmit my application <input type="radio"/> I would like to create/manage goals and metrics for this grant <input type="radio"/> I would like to create/manage a budget for this grant 							
Designated for Approvals User Groups SBA Budget and Grants							

- 4) In the **Grant Status – Not Awarded** form enter the required information indicated with an asterisk.
- For **Do you consider this a competitive grant?**^{*}, select:
 - Yes – discretionary/competitive.
 - No – formulaic/non-competitive.
 - In the **Notification**^{*} field, select the date the Indiana State Agency was informed of its non-award. If the Indiana State Agency received a communication (email, letter, etc.), the date on it should be entered.
 - In the **Not Awarded Reason(s)**, Euna Grants Network has provided the Indiana State Agency with common reasons for not being awarded a grant so the State of Indiana can track them if desired. An Agency Euna user can select more than one reason by holding down the Ctrl (control) key  on the keyboard. Lastly, there are **Notes** and **Attach Files** fields that can be used to provide further information about the non-award notification. If the Agency Euna user would like to **Attach Files**, please see step 4(c) of [Section 2 – Updating Grant Status to Awarded](#) for the process.


Grant Status - Not Awarded

Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021

Complete Status Form

Grant: US17341 Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021

Do you consider this a competitive grant?^{*} ☐ Yes ☐ No [a.](#)

Notification:^{*} [b.](#) 

Not Awarded Reason(s): [c.](#)

General Weakness


- Poorly written and/or organized; hard to understand
- Did not follow instructions or respond to specific requests for information and
- Exceeded specific page limit(s)
- Lacks sufficient evidence of coordination with other individuals and organiza

Objective and Activity Weakness

- Objectives do not match the objectives of the funding organization

Notes:

500 Characters Left

- 5) Once all information is provided click the **Save > button**  to complete the grant status update.

Upload Files

Attach Files:

Save >

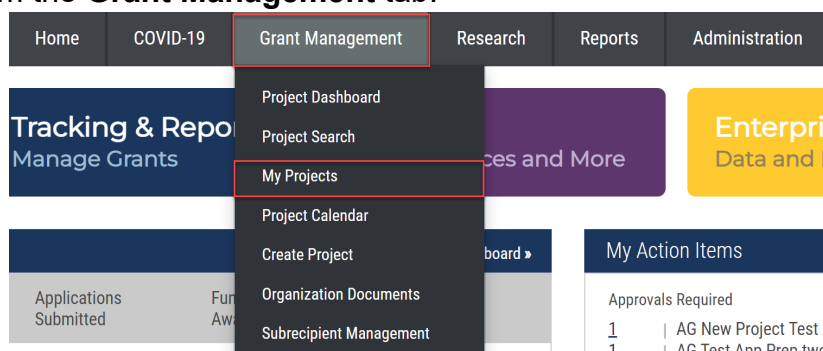
Cancel >

Section 2 – Updating Grant Status to Grant Awarded

Once the Indiana State Agency has received its official award notification from the funder, the Agency Euna user will update the grant status in Euna Grants Network to **Grant Awarded Stage** and upload the award notice/agreement and the [Funding Source Request Form](#). For additional support, see [Appendix A – Grant Awarded](#) for a table of the required Euna Grants Network fields and the information to be entered at **Grant Awarded Stage**. If the Indiana State Agency was not awarded, return to [Section 1 - Updating Grant Status to Grant Not Awarded](#).

The grant status must be updated using the following steps:

- 1) On the Euna Grants Network Homepage, the Agency Euna user will select *My Projects* from the **Grant Management** tab.



- 2) From the list, click the name of the Euna Grants Network project to be updated. In the below example, the Agency Euna user selects the Coronavirus State and Local Fiscal Recovery Fund.

My Projects

Project Search	Project Calendar	Create Project
My Projects		
Project	Department	My Pending Tasks
Coronavirus State and Local Fiscal Recovery Fund	Department 1	0

- 3) On the **Project Dashboard** page under the **Available Actions** list, select *I have received my award notification and I have been awarded*.

Overview	Documents	Grant Lifecycle	Goals & Metrics	Budgets	Contracts & Accounts	Spending	History
Active Grants US17341 Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021 Stage: App. Submitted Projected: \$80,000,000.00 Match: \$0.00				Project Team A. Eulano (Lead) J. Mistlebauer			
Available Actions <ul style="list-style-type: none"><input type="radio"/> I would like to access details of this grant<input checked="" type="radio"/> I have received my award notification and I have been awarded<input type="radio"/> I have received notification that I have not been awarded<input type="radio"/> I need to resubmit my application<input type="radio"/> I would like to create/manage goals and metrics for this grant<input type="radio"/> I would like to create/manage a budget for this grant				Designated for Approvals User Groups <ul style="list-style-type: none">SBA Analyst - FSSASBA Budget and GrantsSBA Grants			

- 4) In the **Grant Status – Grant Awarded** form, enter the required information indicated with an asterisk or as stated below.
- Internal Grant ID** is reserved for SBA usage. Leave this field blank.
 - Internal Grant Name** is reserved for SBA usage. Leave this field blank.

Grant Status - Grant Awarded

GameTime: Fitness Funding (Continental United States) - FY 2023

Complete Status Form

Grant: US17341 Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021


Internal Grant ID:

Internal Grant Name:

- c. The Agency user will need to answer **Do you consider this a competitive grant*** by clicking on the appropriate radio button:
- Yes – discretionary/competitive.
 - No – formulaic/non-competitive.

Do you consider this a competitive grant*? ☒ Yes ☐ No

- d. **Award Notification*** is a date field, the Agency Euna user will click the *Calendar Icon* and populate the award date indicated on the award notice. If a federal cooperative agreement or federal contract, the Agency Euna user should enter the date of the last signature on the agreement.
- e. **Awarded \$*** will default to the amount entered at **Application Submitted** for **Projected Award \$**. The Agency Euna user should only update the amount if different on the award notice.
- f. **Match Required***, like **Awarded \$**, defaults to the responses made at **Application Submitted**. If there are any changes based on the award notice, the Agency Euna user should update those fields accordingly.
- If Yes, **Match Type*** will be required and the Agency Euna user will need indicate the **Match Type*** as either *Cash*, *In-Kind*, or *Cash/In-Kind*.
 - Given the **Match Type*** response, either **Cash Match \$***, **In-Kind Value***, or both will be required and will need a value entered by the Agency Euna user.

Award Notification*: 09/14/2023 

Awarded \$*: 500,000.00


Match Required*: YES


Match Type*:






Cash
In-Kind
Cash/In-Kind
N/A

Cash Match \$*:


In-Kind Value:

Contract Start Date: 

- g. The **Contract Start Date** and the **Contract Start Date** are the budget period. For the **Contract Start Date**, the Agency Euna user will use the *Calendar Icon*  to enter the first date stated for the budget period on the award notice or within the agreement. If only a period of performance/performance period or project period is provided, use that as the **Contract Start Date**.
- h. For the **Contract Close Date**, the Agency Euna user will enter the last date of the stated budget period.
- An Agency Euna user can also create a **Reminder** for the **Contract Close Date** in order to receive notifications and remain aware of the end date for allowable costs to be charged to the project.
- i. The **Award Type** is required by SBA. The Agency Euna user will select either:
- *Advance Payment* – lump sum payment by the funder has been made to the Agency.
 - *Reimbursement* – the Agency must incur expenses first, then draw down their reimbursement from the funder.

Contract Start Date:		
Contract Close Date:		
Reminder:		
Award Type:	<input type="radio"/> Advance Payment <input type="radio"/> Reimbursement	

- j. The **UEI** field is required by SBA. The Agency Euna user will enter the Unique Entity Identifier (UEI) in the **UEI** field that the Agency used to apply for this grant and appears on its award notice, if applicable.
- k. The DUNS Number is not required by either Euna Grants Network or SBA.
- l. For the **Grantor Contract Number**, the Agency Euna user will enter the unique award number associated with the Agency's award such as the FAIN or Federal Award Identification Number, Grant Award/Grant Award Number, agreement number, etc., as stated on the award notice or within the agreement.
- m. **Grant Tags*** will default to the entries made in the **Application Submitted Stage**. The Agency Euna user should review and update as appropriate. To update, select the applicable grants tag under *All Organization Tags* and move it to the *Selected Organization Tags* with the single right arrow.
- Note:** If the Euna project has a state match requirement or the grantee has a State Agency-to-State Agency/Substate transfer, the Agency Euna user must select the "7 - State Match Included" or the "4 - MOU Substate Transfer - UPLOAD FORM or MOU." These tags will auto-generate tasks needed in the awarded stage.
- n. **Notes** field is not required but if there is any new information related to earlier **Notes** provided to SBA, then the Agency Euna user will enter the update here, e.g., Project Period, estimated funding total.

UEI: 	j.	<input type="text"/>
DUNS Number:	k.	<input type="text"/>
Grantor Contract Number:	l.	<input type="text"/>
Grant Tags*:	All Organization Tags	Selected Organization Tags
	 Activity Financial	 MOU Executed - No

o. **Allocation Option section**

- **Are awarded funds to be available for use as pass-through funding?***
Only click the Yes radio button if funding is used for pass-through. If yes, enter the dollar **Amount to earmark for pass-through funding***.
➤ **Amount to earmark for pass-through funding*** will be defaulted to the amount entered for **Awarded \$***.
- Always leave the answer *No* for **Are awarded funds to be available for Allocation to sub-projects?***.

Allocation Option


Are awarded funds to be available for use as pass-through funding?* ☒ No ☐ Yes

Are awarded funds to be available for Allocation to sub-projects?* ☒ No ☐ Yes

- p. Using **Attach Files***, the Agency Euna user will be required to upload the award notice/agreement. Additionally, the Agency Euna user will need to upload the [Funding Source Request Form](#) (this form will also be added to the **Rqst Approval: 2- SBA Finance - FS (Funding Source)** task described in [Section 3 – Automatically Assigned Tasks \(Funding Source\)](#)).

- To upload files, click on the *Manage Files Icon* . This will open the **Upload Files** screen.

Add New Files
Remove Files

Grant: US17341 Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021 

Stage: Grant Awarded

There are no files currently saved to this stage.

Upload up to 8 files at a time but not to exceed 25 Mb - no single file may exceed 10 Mb.

Select Files
Remove Files

Upload Files

Close >

- In this screen, click on the *Select Files button* **Select Files**. This will open the file browser on the Agency Euna user's computer where they will navigate and select a document to upload.

- The file should now appear in the box above the *Upload Files button* **Upload Files**. Click the *Upload Files button* **Upload Files** to upload the file to Euna Grants Network. A loading bar will appear once the upload process begins.

- Once the file has successfully uploaded, a confirmation screen will appear.

- Click the *Close > button* **Close >** and the uploaded file should appear in the **Upload Files** section.







- 5) Once the **Grant Status – Grant Awarded** form is completed and required documents have been uploaded, the Agency Euna user will click the *Save > button* **Save >**.

- If the Euna project has successfully been updated to the **Grant Awarded Stage**, the Project Dashboard will show “**Stage: Grant Awarded**”.

Section 3 – Automatically Assigned Tasks (Funding Source)

- 1) Once the Agency Euna user has updated the project and grant to **Grant Awarded Stage**, two automatic tasks will appear on the **Project Dashboard** in the **Pending Tasks** section. If the “7 - State Match Included” grants tag or the “4 - MOU Substate Transfer - UPLOAD FORM or MOU” grants tag was selected before or while filling out the Grant Awarded Status Form, additional automatic tasks will appear.
 - a. **Task Name:** Rqst Approval: 1- SBA Analyst - FS/Match/Subgrant - [Agency Acronym]
 - **Description:** This task serves three purposes at the Grant Awarded stage:
 - Federal Funding Source (FS): SBA Analyst reviews & approves.
 - State Match: attach a completed State Match Request form.
 - Substate Transfer: attach a completed Subgrant Request form.
 - b. **Task Name:** Rqst Approval: 2- SBA Finance - FS (Funding Source)
 - **Description:** This task serves three purposes at the Grant Awarded stage:
 - Federal Funding Source: attach the following to this task: a completed Funding Source Request Form, the award notice/agreement, and Terms and Conditions.
 - State Match: attach a completed State Match Request form.
 - Substate Transfer: attach a completed Subgrant Request form.

NOTE: If requesting an *Estimated* Funding Source, see [Appendix F – Estimated Funding Source Guidance](#).

Pending Tasks		Completed Tasks		Approval History				
Task Name ⓘ								
Task Name ⓘ	Grant	Stage	Assigned To	Due	Reminder	File(s)	Done	
 Rqst Approval: 1. SBA Analyst - FS/...	ORG0125: FY2025	Grant Awarded	C. Schnick	08/13/2024		 	<input type="checkbox"/>	
 Rqst Approval: 2. SBA Finance - FS ...	ORG0125: FY2025	Grant Awarded	C. Schnick	08/13/2024		 	<input type="checkbox"/>	

- c. **Task Name:** Submit State Match Fund Request
 - **Description:** This is a reminder to assign your agency's SBA-created State Match Fund (in Organization Funding) to this federal Euna Project if you have a State Cash Match. Agencies are required to request state match at the same time as their federal funding source. For more information, review [Section 5 – Submit State Match Fund Request](#).
- d. **Task Name:** Create Substate Org Funding
 - **Description:** - The Granting Agency of a Substate Transfer must create Organization Funding that represents the amount of the award they are transferring to another agency/agencies. Attach executed MOU documentation. Include a note outlining the amounts available to each subgrantee.
 - The Substate Agency then creates an Euna project from the Granting-created Substate Transfer Org Funding.
 - For more information, please review the User Guide: Grantee Post-Award Management on the SBA Grants Management Website.
 - For more information, review [Section 6 – Create Substate Transfer Org Funding](#).








c.	Submit State Match Fund Request	US17573B: FY2022	Grant Awarded	L. Kenworthy	09/15/2023		<input type="checkbox"/>
d.	Create Substate Transfer Org Fundin...	US17573B: FY2022	Grant Awarded	L. Kenworthy	09/15/2023		<input type="checkbox"/>





- 2) Both tasks will be assigned to the **Project Lead** to complete, and a checkbox appears under the **Done** column in **Pending Tasks**. If these tasks need to be reassigned to another **Project Team** member to complete, please see [Appendix E – Completing Pending Tasks](#).
- 3) To complete the task, the Agency Euna user will click the *Done checkbox* next to the first task titled **Rqst Approval: 1- SBA Analyst - FS/Match/Subgrant - [Agency Acronym]**.

Pending Tasks

Completed Tasks

Approval History

Task Name 	Grant	Stage	Assigned To	Due	Reminder	File(s)	Done
 Rqst Approval: 1. SBA Analyst - FS/...	ORG0125: FY2025	Grant Awarded	C. Schnick	08/13/2024		 	<input type="checkbox"/>
 Rqst Approval: 2. SBA Finance - FS ...	ORG0125: FY2025	Grant Awarded	C. Schnick	08/13/2024		 	<input type="checkbox"/>



- 4) The **Approval Request Form** will appear for this task only. Enter the *Approval Due** date and click the *Save > button*  to complete the task.
 - a. **Attachments:** This is only required if the award notice/agreement and/or [Funding Source Request Form](#) has not been provided previously. Upload these files by clicking the *Add Files Icon* .
 - b. **Approval Due*:** The Agency Euna can click the *Calendar Icon*  to set a preferred date to receive a funding source.
 - c. **Reminder:** The Agency Euna can click the *Calendar Icon*  to set a reminder date for SBA to create a funding source.
 - d. **Notes to Approver:** Use this textbox to enter any notes to send to the SBA approver regarding the award and/or Funding Source Request Form.

Approval Request Form

Project:
Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021


Grant:
US17341 Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021


Task:
Rqst Approval: SBA Budget and Grants - Award Acknowledgement (Approval)


Attachments :



Description:
SBA Budget and Grants approval that they are aware of the award and project within eCivis.

Approver:
SBA Budget and Grants

Approval Due*:


Reminder:




Files to Forward :
No files are currently attached.

Notes to Approver:
1000 Characters Left

Save >
Cancel >

- 5) Returning to the **Project Dashboard** page, the remaining task titled **Rqst Approval: 2-SBA Finance - FS (Funding Source)** should be completed just like the **Rqst Approval: 1- SBA Analyst - FS/Match/Subgrant - [Agency Acronym]** task.
- 6) Completing these two automatic tasks will trigger the approval process with SBA. With the completion of the **Rqst Approval: 2- SBA Finance - FS (Funding Source)** task, the SBA representative will provide the Indiana State Agency its Funding Source Number/ID for the Euna project and grant.
 - a. The Funding Source Number/ID will be communicated to the Indiana State Agency in two ways:
 - First, within an automatic Euna Grants Network generated email indicating that the **Rqst Approval: 2- SBA Finance - FS (Funding Source)** task has been completed and approved by SBA. In that email, there is a **Notes** section where the SBA representative will enter the Funding Source Number/ID.



- Additionally, the SBA representative will enter the Funding Source Number/ID in the **Internal Grant ID** field within the **Contracts and Accounts** tab of the Euna Grants Network project. The Funding Source Number is represented as Allocating BU – Funding Source – Owning BU (where BU = Business Unit). See [Appendix H – State of Indiana Agencies, Acronyms, and BUs](#).

ORG0065 Election Security Grant

Stage: Grant Awarded Awarded: \$1,293,215.00 Match: \$0.00

Grant Contract Summary Revenue & Expense Accounts

Award Notification Date: 06/30/2023

Contract Start Date: 03/23/2018

Contract Close Date: 09/30/2099

Award Type: ☒ Advance Payment ☐ Reimbursement

Award Documents:

Grantor Contract Number:

UEI: FFQLN5KMDGX3

DUNS Number:

Search:

Account Name	Number	Type
No data available in table		

1 - 0 of 0 Accounts [← Previous](#) [Next →](#)

Grant Identifiers

Internal Grant ID: 00040--00040

Internal Grant Name:

Notes

Section 4 – Award Adjustment/Award Amendment

If an amendment/modification is issued for the project and grant, a **Project Team** member must inform SBA through Euna Grants Network.

- 1) On the **Project Dashboard** page, the Agency Euna user will select *I have received a grant adjustment notice and need to amend my grant agreement* from the **Available Actions** list.

The screenshot shows the Project Dashboard interface. At the top is a navigation bar with tabs: Overview, Documents, Grant Lifecycle, Goals & Metrics, Budgets, Contracts & Accounts, Spending, and History. Below the navigation bar, the 'Overview' tab is active. The main content area displays 'Active Grants' with a search icon. The grant title is 'US17058A Charging and Fueling Infrastructure (CFI) Discretionary Grant Program (Part A): Community Program - FY 2022/2023'. Below the title, it shows 'Stage: Grant Awarded', 'Awarded: \$1,000,000.00 *', and 'Match: \$200,000.00'. On the right side, there is a 'Project Team' section with a user 'A. User (Lead)'. Below that, there is a 'Designated for Approvals' section and a 'User Groups' section with 'SBA Budget and Grants' and 'SBA Finance'. The 'Available Actions' list is on the left, with the option 'I have received a grant adjustment notice and need to amend my grant agreement' highlighted with a red box. Other options include 'I would like to access details of this grant', 'I would like to request an account setup', 'I am ready to schedule my report', 'This grant does not require a report', 'I am ready to initiate grant closeout', 'I would like to view/manage my contract & account details', 'I would like to create/manage goals and metrics for this grant', and 'I would like to create/manage a budget for this grant'. A footnote at the bottom states '*These funds have been made available for pass-through funding.'

- 2) The **Grant Status – Grant Amendment** form will appear.

Grant Status - Grant Amendment




Charging and Fueling Infrastructure (CFI) Discretionary Grant Program

The screenshot shows the 'Complete Status Form' for the 'Charging and Fueling Infrastructure (CFI) Discretionary Grant Program'. The form fields are: 'Grant:' with the value 'US17058A Charging and Fueling Infrastructure (CFI) Discretionary Grant Program (Part A): Community Program - FY 2022/2023'; 'Internal Grant ID:'; 'Internal Grant Name:'; 'Do you consider this a competitive grant?:' with the value 'Yes'; 'Amendment Type*:' with a dropdown menu showing 'Select Amendment Type:'; 'Award Notification Date*:' with the value '07/11/2023'; 'Adjustment Notification Date*:'; and 'Award Adjustment \$:'.




- 3) The Agency Euna user will select the **Amendment Type*** from the option list. Based on their selection different fields will appear in the form.

The screenshot shows the 'Amendment Type*:' dropdown menu. The dropdown is open, showing the following options: 'Select Amendment Type:', 'Award Amount', 'Contract Extension', 'Budget', 'Scope of Work', and 'Other (specify in notes)'. The option 'Select Amendment Type:' is highlighted with a red box.

- a. **Award Amount:** Enter an increase (positive figure) or decrease (negative figure) in the **Award Adjustment \$** field. The Agency Euna user will see the **Adjusted Total Award \$** either increase or decrease depending on the entry in the **Award Adjustment \$** field.
 - **Award Adjustment \$:** Enter the difference between the initial award total and the adjusted award total. Verify the total award amount in the adjusted Total Award field.
 - b. **Contract Extension:** Requires changing the **Contract Close Date**. The Agency Euna user should also change the **Reminder** date if entered.
 - c. **Budget:** Changes should be stated in the **Grant Amendment Notes*** section e.g., reallocated \$100,000 to the Contractual budget category.
 - d. **Scope of Work:** Changes should be stated in the **Grant Amendment Notes*** section e.g., the project will now include the counties of X, Y, and Z.
 - e. **Other (specify in notes):** Selection indicates to the Agency Euna user to enter more information in the **Grant Amendment Notes*** section.
- 4) The Agency Euna user will not change the **Award Notification Date*** as that represents the original award date of the grant.

Complete Status Form	
Grant:	US17058A Charging and Fueling Infrastructure (CFI) Discretionary Grant Program (Part A): Community Program - FY 2022/2023
Internal Grant ID:	
Internal Grant Name:	
Do you consider this a competitive grant?:	Yes
Amendment Type*:	Select Amendment Type: 
Award Notification Date*:	07/11/2023 
Adjustment Notification Date*:	

- 5) The Agency Euna user will enter the date the amendment was received as stated on the adjustment notice in the **Adjustment Notification Date*** field.

Complete Status Form	
Grant:	US17058A Charging and Fueling Infrastructure (CFI) Discretionary Grant Program (Part A): Community Program - FY 2022/2023
Internal Grant ID:	
Internal Grant Name:	
Do you consider this a competitive grant?:	Yes
Amendment Type*:	Select Amendment Type: 
Award Notification Date*:	07/11/2023 
Adjustment Notification Date*:	07/31/2023 
Award Adjustment \$:	

- 6) Use the left and right arrows to add or remove appropriate **Grant Tags*** based on the amendment.



Grant Tags*: All Organization Tags Selected Organization Tags

2 - Maintenance of Effort
3 - Third Party Match -
5 - Staff Needed - New
6 - Staff Needed - New
Activity
Financial
Monitoring
New Grant Tag Test
OLD - Maintenance of Effort

1 - Not Applicable
4 - MOU Substate Tran
7 - State Match Include

- 7) In the **Grant Amendment Notes*** field add any other relevant notes related to the amendment process.

Grant Amendment Notes*

- 8) The Agency Euna user will click the *Upload Files Icon*  to **upload the amendment notice and a Funding Source Request Form, if appropriate**. If the Agency Euna user would like to attach files, see [Step 2 – Updating Grant Status to Awarded](#) for the process. Then click the *Save > button* .

Upload Files

Please attach your grant adjustment notice, and any other files necessary for this stage

Attach Files:

Tasks_Report_20230721.xlsx (30.0 Kb)

Save > Cancel >

- 9) **Federal Funding Source Adjustment Request** task:

If the amendment is a **decrease or increase in the award amount**, or a **change in the budget period or period of performance**, the Agency Euna user will need to create two advanced approval tasks.

See [Appendix D – Creating Advanced Tasks](#) for more guidance. Please include:

SBA Analyst Approval Task

- Name: **1. SBA Analyst - FS Adjustment**
- Assigned to: Appropriate member of the **Project Team**
- Designated for Approval: **User Group: SBA Analyst – [Agency Acronym]**

SBA Finance Approval Task

- Name: **2. SBA Finance - FS Adjustment**

- b) Assigned to: Appropriate member of the **Project Team**
- c) Designated for Approval: **User Group: SBA Finance**
- d) Attachments: an updated Funding Source Request Form & the Grant Award.
- e) Notes: describe what is being requested & the reason for the request.

NOTE: Wait until SBA Analyst task is approved before sending SBA Finance Approval Task.

10) State Match Adjustment Request task:

If the amendment is a **decrease or increase in the State Match award amount**, or a **change in the budget period or period of performance**, the Agency Euna user will need to create two advanced approval tasks.

See [Appendix D – Creating Advanced Tasks](#) for more guidance. Please include:

SBA Analyst Approval Task

- a) Title: **1. SBA Analyst - State Match Adjustment**
- b) Assigned to: Appropriate member of the **Project Team**
- c) Designated for Approval: **User Group: SBA Analyst – [Agency Acronym]**

SBA Finance Approval Task

- a) Title: **2. SBA Finance - State Match Adjustment**
- b) Assigned to: Appropriate member of the **Project Team**
- c) Designated for Approval: **User Group: SBA Finance**
- d) Attachments: an updated State Match Request form & the Grant Award.

NOTE: Wait until SBA Analyst task is approved before sending SBA Finance Approval Task.

If a change to the State Match award amount occurs, the Agency Euna User must also update the Federal Euna Project's Grants Lifecycle so the Match amount is correct.

Section 5 – Submit State Match Fund Request

State Match will be handled differently than the previous sections for Organization Funding.

For SBA: SBA will create one Organization Funding entry for each appropriate Agency. The **Funding Title** will be the Agency's name with "State Match Fund" and the SFY succeeding it. For example:

- **State Match Fund - IN State Budget Agency - SFY24**

For **Funding Type**, the SBA Euna user will select "State" because the match is coming from a designated State funding source. The **Agency** field will be populated with the Agency that will be utilizing this State Match Organization funding. In the example above, it would be "IN State Budget Agency."

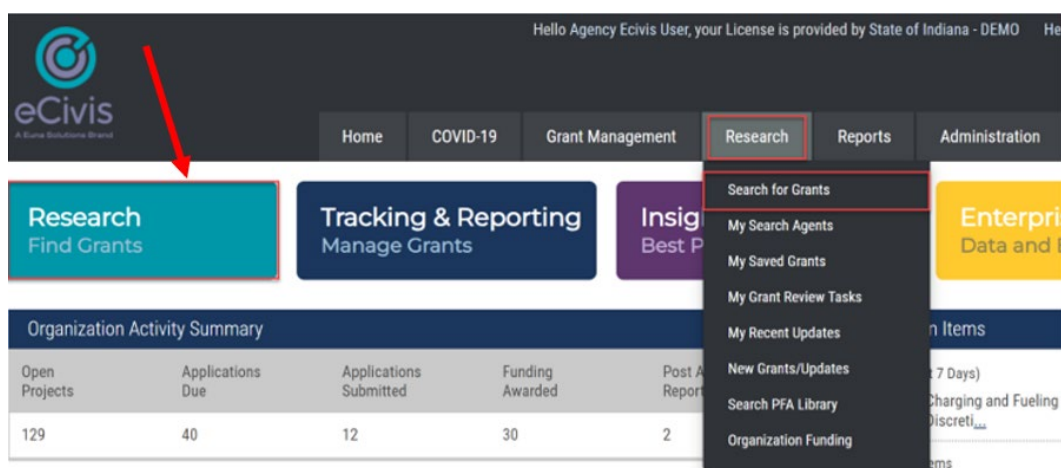
The **Office**, **FAIN**, **Organization ID**, **Grant Contact**, and **CFDA** fields are not required.

- The **Total Funds** field for State Match Organization Funding will be entered as \$1,000,000,000 (\$1B). "No" will be selected for the **Matching Required** field.
- The **Attachments** field is not required for this type of Organization Funding.

For Agency Euna users: From the Organization Funding page, agencies receiving Federal funds that call for a State Cash Match will find their corresponding SBA-created Organization Funding source and add it to the associated Federal Euna project to fulfill their State Cash Match.

Search for your agency's SBA-created State Match Fund:

- 1) Go to Research: Find Grants



- 2) Search for "State Match Fund" with the following criteria:
 - a. Grant Type and Agency > Type > Organization - State
 - b. Select the checkbox next to *Include Organizational Funding*
 - c. Click **Apply Filter**

Search by Keyword

See help popup for advanced search syntax.

State Match

Show all grants tagged with the keyword COVID-19

Search Agent

Run an existing search agent.

Existing Search Agents

Filter

Categories

Search Results

Results 1 - 25 of 94 (0.015 seconds)

Grant Type and Agency

☐ All ☒ Specify Type ☒ Include Organizational Funding ☐ Include Archived Grants

Type:

Indiana
Organization - County/Regional
Organization - Federal
Organization - Foundation
Organization - Other
Organization - State
Organization - Tribal

Agency:

All





Other Criteria

Apply Filter

(Part B): Matching Grants (Limited Eligibility): FY 2023

95.11 FD0257 National Forest Foundation (NFF): Matching Awards Program (MAP): Connecting People to Forests - FY 2023 (2) FD Foundation Unspecified 06/07/2023

- 3) Click on your agency's State Match Fund (with the correct State Fiscal Year "SFY" designation), or click the *Save/Assign Icon* .

Score	GN Code	Grant Title	Agency	Actual Funds	Due Date	
100.00	ORG0226	State Match Fund - IN State Budget Agency - SFY24	IN State Budget Agency	\$1,000,000,000	N/A	
99.99	ORG0198	State Match Fund - IN Secretary of State - SFY24	SBA	\$1,000,000,000	N/A	
99.99	ORG0199	State Match Fund - IN State Library - SFY24	SBA	\$1,000,000,000	N/A	
99.99	ORG0200	State Match Fund - IN State Police - SFY24	SBA	\$1,000,000,000	N/A	

NOTE: As of July 1, 2025, State Match Org Funding will be assigned to the existing applicable Federal Euna Project.

- 4) In the *Save/Assign Grant* pop up, the Euna user will select "Assign grant to an existing project".

Organization

This feature allows you to...

Add Org Fund

Public Organization

10 records

Showing 1 to 10 of

Save/Assign Grant






Grant: ORG0163 State Match Fund - IN State Budget Agency - SFY26

☒ Assign grant to an existing project

☐ Assign grant to a new project

☐ Save as unassigned

Cancel

GN Code	Funding Title	Fiscal Year	Funding Type	Total Funds	App Due	Actions
ORG0163	State Match Fund - IN State Budget Agency - SFY26	2026	Non-Competitive	\$1,000,000,000	N/A	    

- 5) In “Assign Grant to Existing Project” 1. *Select Department & Project*, select the **Department** and Federal **Project** for which the State Cash Match is required.

The screenshot shows a web form titled "Assign Grant to Existing Project". The first section, "1. Select Department & Project", contains a "Grant:" field with the value "ORG0163 State Match Fund - IN State Budget Agency - SFY26". Below this are two required fields: "Department *" with a dropdown menu showing "Select Department", and "Project *" with an empty dropdown menu.

- 6) This addition of State Match to the Euna project will be non-competitive and move straight to the Grant Awarded stage.
Select “No” for **Is an application required for this grant? ***.
In the dropdown next to **Grant Status ***, select *Grant Awarded*.

The screenshot shows the continuation of the form. Step 2, "2. Select Funding Status", includes the question "Is an application required for this grant? *" with radio buttons for "Yes" and "No", where "No" is selected. Step 3, "3. Select Grant Status", features a "Grant Status *" dropdown menu. The dropdown is open, showing options: "Select Grant Status", "Under Consideration", "Award Projected", and "Grant Awarded" (which is highlighted). "Save" and "Cancel" buttons are visible at the bottom left.

Note: For “Amount Awarded”, the addition of State Match Org Funding is only for Cash Match.

If the State Match funding will be used for pass-through, the Agency Euna user will select “Yes” for **Are awarded funds to be available for use as pass-through funding? ***.

Submitting a State Match Request within the combined Federal & State Match Project

Once the State Match Organization Funding has been saved at the Grant Awarded Stage, the same two auto-assigned tasks from creation of the Federal Euna Project will appear within Pending Tasks.

Note: with both the Federal Grant & State Match Org Funding assigned to the Euna Project, the column labeled “Grant” to the right of “Task Name” becomes very important.

The beginning of each Active Grant listed within the Project begins with a “GN Code” (Grants Network Code) which corresponds to the Grant column beneath Pending Tasks.

Project Dashboard: [Test] National Endowment for the Arts (NEA): Grants for Arts Projects (GAP) - FY 2026

Department: 057 - SBA - State Budget Agency

[Data Integration Options](#)
[Project Options](#)

Overview	Documents	Grant Lifecycle	Goals & Metrics	Budgets	Contracts & Accounts	Spending	History
<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div> <p>Active Grants </p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> ORG1203 State Match Fund - IN State Budget Agency - SFY25 </div> <p>Stage: Grant Awarded Awarded: \$250,000.00 Match: \$0.00</p> </div> <div> <p>Project Team </p> <p>C. Schnick (Lead) Grants Managem...</p> </div> </div>							
<div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> US10090 National Endowment for the Arts (NEA): Grants for Arts Projects (GAP) - FY 2026 </div> <p>Stage: Grant Awarded Awarded: \$750,000.00 Match: \$250,000.00</p>							

Pending Tasks	Completed Tasks	Approval History					
Task Name	Grant	Stage	Assigned To	Due	Reminder	File(s)	Done
Rqst Approval: 1- SBA Analyst - FS/Match/Subgrant - SBA	ORG1203: FY2025	Grant Awarded	C. Schnick	06/24/2025			<input type="checkbox"/>
Submit State Match Fund Request	US10090: FY2026	Grant Awarded	C. Schnick	05/08/2025			<input type="checkbox"/>
Contract Close	US10090: FY2026	Grant Awarded	C. Schnick	06/30/2026	03/31/2026		<input type="checkbox"/>

- Both tasks will be assigned to the **Project Lead** to complete, and a checkbox appears under the **Done** column in the **Pending Tasks** section. If these tasks need to be reassigned to another **Project Team** member to complete, see [Appendix E – Completing Pending Tasks](#).
- To complete the task, the Agency Euna user will click the *Done checkbox* next to the first task titled **Rqst Approval: 1- SBA Analyst - FS/Match/Subgrant - [Agency Acronym]**

Task Name: Rqst Approval: 1- SBA Analyst - FS/Match/Subgrant - [Agency Acronym]

Description: This task serves three purposes at the Grant Awarded stage:

- Federal Funding Source (FS): SBA Analyst reviews & approves.
- State Match: attach a completed State Match Request form.
- Substate Transfer: attach a completed Subgrant Request form.

Upload Files: The State Match Form is required to be uploaded before saving.

The **Approval Request Form** will appear for this task only. Enter the *Approval Due** date and click the *Save > button* to complete the task.

- a. **Attachments:** This is only required if the award notice/agreement and/or [State Match Request Form](#) has not been provided previously. Upload these files by clicking the *Add Files Icon*.
- b. **Approval Due*:** The Agency Euna can click the *Calendar Icon* to set a preferred date to receive a funding source.
- c. **Reminder:** The Agency Euna can click the *Calendar Icon* to set a reminder date for SBA to create a funding source.
- d. **Notes to Approver:** Use this textbox to enter any notes to send to the SBA approver regarding the award and/or State Match Request Form.

Returning to the **Project Dashboard** page, the remaining task titled **Rqst Approval: 2- SBA Finance - FS (Funding Source)** should be completed just like the **Rqst Approval: 1- SBA Analyst - FS/Match/Subgrant - [Agency Acronym]** task.

Note: Completing these two automatic tasks will trigger the approval process with SBA. With the completion of the **Rqst Approval: 2- SBA Finance - FS (Funding Source)** task, the SBA representative will provide the Indiana State Agency its Funding Source Number/ID for the Euna project and grant.

The Funding Source Number/ID will be communicated to the State Agency in two ways:

- First, within an automatic Euna Grants Network generated email indicating that the **Rqst Approval: 2- SBA Finance - FS (Funding Source) Approval** task has been completed and approved by SBA. In that email, there is a **Notes** section where the SBA representative will enter the Funding Source Number/ID.
- Additionally, the SBA representative will enter the Funding Source Number/ID in the **Internal Grant ID** field within the **Contracts and Accounts** tab of the Euna Grants Network project. The Funding Source Number is represented as Allocating BU - Funding Source - Owning BU (where BU = Business Unit).

Section 6 – Create Substate Transfer Org Funding

For State Agency Grantor of Substate Transfer: For State Agency-to-State Agency/Sub-State Transfers, the state agency providing the funding to another state agency(ies) will create the Organization Funding. In the same way we use a Federal Funding Source to allocate substate transfers, the State Agency must represent that Federal Funding Source with Organization Funding. Agencies will still be required to process the MOU through [SCM](#).

Similar to State Match, if an agency has substate transfers to multiple agencies, the Agency Euna user can create one Organization Funding opportunity for the receiving agencies to request funding for. See [Appendix F of the Pre-Award User Guide](#) for guidance on creating Organization Funding.

The Granting State Agency Organization Funding's **Funding Title** will indicate the following:

- The **Funding Title** begins with the agreement type, Substate Transfer.
- The state agency providing the funding by using the acronym naming convention in [Appendix H – State of Indiana Agencies, Acronyms, and BUs](#).
- The originating source of funding should be copy/pasted from the Project name that the Granting State Agency set up for its funding e.g., Coronavirus State and Local Fiscal Recovery Funds.
- The FFY included at the end of the title to indicate in which federal fiscal year the funding is available for the state agency's usage. Use two digits to represent the year.

- **Granting Organization Funding's Title Format:**

Substate Transfer - Granting Agency Acronym - Title of original source of funding - FFY##

- For example, SBA was awarded the State and Local Fiscal Recovery Funds. SBA is transferring these federal funds to the Office of Management and Budget ("OMB") for Federal Fiscal Year 2024 through an MOU. A Granting State Agency Euna user would create a **Funding Title** like the one below:
- Substate Transfer - IN SBA - State Recovery Fund - FFY24

ORG0223 Substate Transfer - IN SBA - State Recovery Fund - FFY24

Save / Assign

Email Grant

Grant Usage

Summary	Eligibility/Application	Financial	Contact/Files
Type:	Federal	Next Due:	N/A
Agency:	IN State Budget Agency	Match Required:	No
CFDA/ALN:	21.207	Actual Funds:	\$10,000,000
Summary: The State Budget Agency is the primary recipient of the State and Local Recovery Fund and providing multiple agencies, with fully executed MOUs, with funding via this Organization Funding.			

For **Funding Type**, "State" will be selected. **Agency** is the name of the Funder. This field will be populated by the state agency that is the Funder. In the above example, SBA is providing the funds to the IN Office of Management and Budget. See [Appendix H – State of Indiana Agencies, Acronyms, and BUs](#) for the appropriate naming conventions.


The **Office**, **FAIN**, **Organization ID**, and **Grant Contact** fields are not required. For the **CFDA Number**, the CFDA (Assistance Listing) number will be entered.

In the **Total Funds** field for State-to-State/Department Transfers, the Agency Euna user for the department/agency entering the Organization Funding will enter the amount available to all state departments/agencies being funded by the originating funding source.




- In the SBA example, SBA was awarded \$10,000,000 (\$10M) from the U.S Department of the Treasury. SBA will provide \$6,000,000 (\$6M) to OMB through an MOU. In this case, the **Total Funds** field would be \$6,000,000 (\$6M) as that is the total amount available for transfer.
- However, if SBA were also providing \$4,000,000 (\$4M) to the Governor's Office, the Total Funds field would be \$10,000,000 (\$10M). **This is because the State Agency creates one Organization Funding for all MOUs associated with the original federal funding.**

The **Attachments** field allows Agency Euna users to provide a website link, and/or upload document(s), related to creating the funding opportunity. Although this section is not required by Euna Grants Network, SBA requires it to verify the data elements entered. Therefore, each State-to-State/Substate Transfer is required to provide one of the following:

- Memorandum of Understanding (MOU);
- Notice of Funding Opportunity (NOFO);
- Notice of Award (NOA);
- Application(s), Certificate(s), and/or Agreement(s);
- Grants.gov listing, and/or;
- SAM.gov Assistance Listing;
- Website or page of the funding opportunity from the Funder.

When the Organization Funding entry is finalized, and in the system, the State-to-State/ Department Transfer will be distributed by using the *Email Grant button*  [Email Grant](#) at the entered Organization Funding's page.

ORG0223 IN State Budget Agency - Substate Transfer - State and Local Fiscal Recovery Fund - FY23

Summary	Eligibility/Application	Financial	Contact/Files
<div style="display: flex; justify-content: space-between;"> <div> Type: Federal Agency: IN State Budget Agency CFDA/ALN: 21.207 </div> <div> Next Due: N/A Match Required: No Actual Funds: \$1,000,000,000 </div> </div>			
<p>Summary:</p> <p>The State Budget Agency is the primary recipient of the State and Local Recovery Fund and providing multiple agencies, with fully executed MOUs, with funding via this Organization Funding.</p>			

The Agency Euna user will check the **Grants Network User** box. From there, the Agency Euna user can select the specific department and Agency Euna users to which the Organization Funding applies. Additionally, the Agency Euna user may include a brief explanation of the Organization Funding and instructions for use in the **Grants Network User Notes** box.

Email Grant ✕

Email Grant

From: Agency eCivis User

Re: ORG0019 Charging and Fueling Infrastructure (CFI) Discretionary Grant Program - FFY23

To: ☒ Grants Network User ☐ Non Grants Network User

Grants Network User

Select one or more departments to narrow the list of users below (Ctrl+Click to select multiple)

All Departments

Alpha

Bravo

Charlie

Delta

All Users

Agency eCivis User

☒ Create Grant Review Task Review By:

Grants Network User Notes:

500 Characters Left

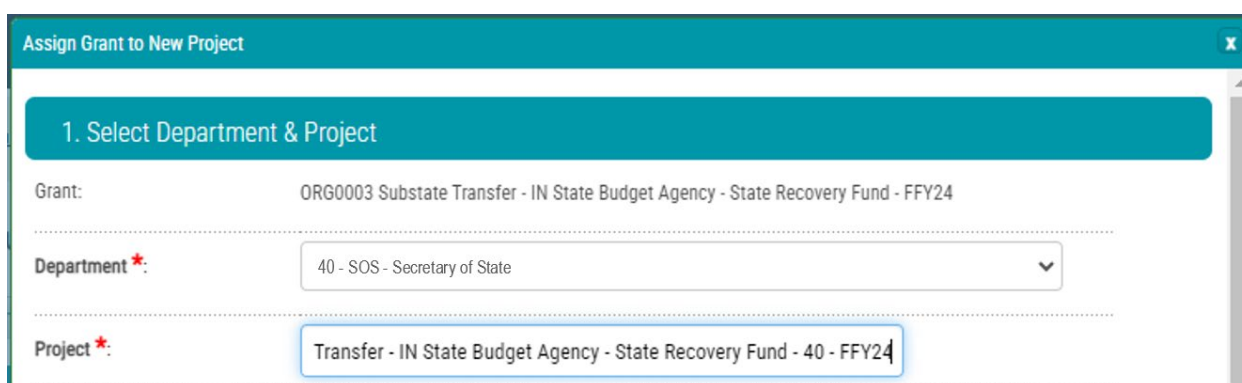
Send Email ➤

Cancel ➤

For the Substate Grantee (“receiving agency”):

The substate grantee must create a new Euna project following the steps of the [Euna Grants Network Pre-Award User Guide](#) with the following exceptions:

- For the Title, the Euna user will copy the title of the Substate Transfer Organization Funding, but include Business Unit of the Agency Euna user between the Federal Grant name and the federal fiscal year. See [Appendix H – State of Indiana Agencies, Acronyms, and BUs](#) for your Business Unit. For example, if IN Secretary of State were to create the Euna Project the following would be the titles:
- **Granting Organization Funding Title:**
Substate Transfer - IN SBA - State Recovery Fund - FFY24
- **Substate Euna Project Title:**
Substate Transfer - IN SBA - State Recovery Fund - 40 - FFY24



- Like State Match, Substate Transfer Euna projects will be non-competitive & move straight to Grant Awarded.
 - The Agency Euna user will select “No” for **Is an application required for this grant?** *.
 - In the dropdown next to **Grant Status** *, select Grant Awarded.

If the substate transfer funding will be used for pass-through, the Agency Euna user will select “Yes” for **Are awarded funds to be available for use as pass-through funding?** *.

Note: Do not select “4 - MOU Substate Transfer - UPLOAD FORM or MOU” since this is the MOU request. However, if the Substate will require a State Match, select the “7 - State Match Included” grants tag.

Note: We recommend adding the appropriate staff from the Granting agency to the Euna project. This will allow the Granting Agency to add and complete any tasks normally performed in substate transfers.

Upload Files: The fully executed Memorandum of Understanding (MOU) is required to be uploaded before saving.

There are two automatic approval tasks that must be sent to SBA, the 1- SBA Analyst - FS/Match/Subgrant - [Agency Acronym] task and the 2- SBA Finance - FS (Funding Source)task (including [Subgrant Request Form](#)).

Automatically Assigned Tasks

1. Once the Agency Euna user has updated the project and grant to **Grant Awarded Stage**, two automatic tasks will appear on the **Project Dashboard** in the **Pending Tasks** section. If the “7 - State Match Included” grants tag was selected before or while filling out the Grant Awarded Status Form, additional automatic tasks will appear.
 - **Task Name:** Rqst Approval: 1- SBA Analyst - FS/Match/Subgrant - [Agency Acronym] **Required Action:** Upload a completed [Subgrant Request Form](#) in order for your SBA analyst to perform the functions related to the budget journal process for the substate transfer.
 - a. **Task Name:** Rqst Approval: **2- SBA Finance - FS (Funding Source)**
 - **Required Action:** The task will include a blank [Subgrant Request Form](#). Upload a completed Substate Request Form in order to receive a funding source for the substate transfer.
 - b. **Task Name:** Submit State Match Fund Request

Action Required: The Agency Euna user must request state match by creating a new Euna project through the agency’s dedicated State Match Fund in Euna.

2. Completing these two automatic tasks will trigger the approval process with SBA.

NOTE: For Substate Transfer Euna Projects, the **Rqst Approval: 1- SBA Analyst - FS/Match/Subgrant - [Agency Acronym]** task will be completed, *first*. This allows the Substate Grantee/ Receiving agency’s SBA Analyst to create an additional Approval Task to send to the Granting Agency’s SBA Analyst.

Once both SBA Analyst tasks have been completed, **Rqst Approval: 2- SBA Finance - FS (Funding Source)** can be submitted to SBA Finance.

With the completion of the **Rqst Approval: 2- SBA Finance - FS (Funding Source)** task, the SBA representative will provide the Indiana State Agency its Funding Source Number/ID for the Euna project and grant and post the necessary Budget Journals.

- a. The Funding Source Number/ID will be communicated to the Indiana State Agency in two ways:
 - First, within an automatic Euna Grants Network generated email indicating that the **Rqst Approval: 2- SBA Finance - FS (Funding Source)** task has been completed and approved by SBA. In that email, there is a **Notes** section where the SBA representative will enter the Funding Source Number/ID.
 - Additionally, the SBA representative will enter the Funding Source Number/ID in the **Internal Grant ID** field within the **Contracts & Accounts** tab of the Euna Grants Network project. The Funding Source Number is represented as Allocating BU – Funding Source – Owning BU (where BU = Business Unit).

Section 7 – Program Income and Rebate Organization Funding

According to [2 CFR 200.307](#), program income is defined as income that “non-Federal entities are encouraged to earn”... “to defray program costs where appropriate.” Program income must be authorized by Federal regulations or the Federal award and is used in one or more of the following approaches: deduction, addition, and/or cost sharing or matching. Please see your agency’s Federal award & [eCFR 200.307 Program income](#) for more information.

For Program Income: The Euna Agency user must represent Program Income with Organization Funding in Euna Grants Network, in the same way a State Funding Source is used to allocate Program Income in Peoplesoft Financials, i.e. “State Revenue.”.

The **Funding Title** will indicate the following:

- The **Funding Title** begins with the funding type, Program Income.
- The originating source of funding should be copy/pasted from the Project name that the program income is authorized. e.g., Coronavirus State and Local Fiscal Recovery Funds.
- The FFY included at the end of the title to indicate in which federal fiscal year the Program Income funding is available for the state agency’s usage. Use two digits to represent the year. Depending on the source of funding, the FFY will also be included at the end of the title. For example:
- **Title Format: Program Income - Title of Euna originating/funding source project name - FFY##**
 - In the previous example, SBA was awarded the Coronavirus State and Local Fiscal Recovery Funds. Since SBA is earning program income from a funded project, the SBA Euna user would enter:
 - Program Income - Coronavirus State Fiscal Recovery Fund - FFY25

For **Funding Type**, the Agency Euna user would select “State.”

Agency is the name of the Funder. Please refer to the name of the entity from which the program income is authorized.

The **Office**, **FAIN**, **Organization ID**, and **Grant Contact** fields are not required.

The **CFDA Number** (Assistance Listing) field is required as the funding originated from a Federal source.

The **Summary** field will contain text briefly explaining the program income. For example:

- Program income earned from [insert Federal or State funding source].

The **Attachments** field allows Agency Euna users to provide a website link and/or upload document(s) related to the creation of the funding opportunity. For Program Income, this section of Organization Funding is not required by SBA.

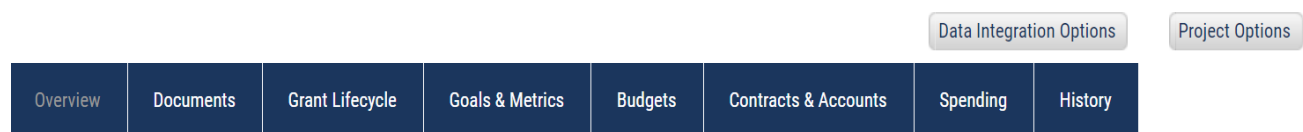
Program Income Euna Project

Using the newly-created Program Income Organization Funding, the State Agency must create a new Euna project following the steps of the [Euna Grants Network Pre-Award User Guide](#) with the following exceptions:

The **Project Name** should mirror the originating project/funding source created in Euna with “Program Income” preceding it, as shown in the screenshot, below.

Project Dashboard: Program Income - Coronavirus State and Local Fiscal Recovery Fund - FFY23

Department: Alpha



- Like State Match & Substate Transfers, Program Income Euna projects will be non-competitive & move straight to Grant Awarded.
 - The Agency Euna user will select “No” for Is an application required for this grant? *.
 - In the dropdown next to Grant Status *, select Grant Awarded.

If the Program Income will be used for pass-through, the Agency Euna user will select “Yes” for Are awarded funds to be available for use as pass-through funding? *.

Upload Files: An award notice/agreement from the originating/funding source grant award for which program income is authorized is required to be uploaded before saving.

There are two automatic approval tasks that must be sent to SBA, the 1- SBA Analyst - FS/Match/Subgrant - [Agency Acronym] task and the **2- SBA Finance - FS (Funding Source)** task.

Automatically Assigned Tasks

1. Once the Agency Euna user has updated the project and grant to **Grant Awarded Stage**, two automatic tasks will appear on the **Project Dashboard** in the **Pending Tasks** section.
 - a. **Task Name:** Rqst Approval: **1- SBA Analyst - FS/Match/Subgrant - [Agency Acronym]**
 - **Required Action:** Allot Control - SBA analyst perform the functions related to Allot Ctrl process for the award and project within Euna Grants Network.
 - In the *Notes to Approver* section, please include your 10-digit Budget Journal IDs for each of the following: ALLOT, ALLOT_CTRL, and APPROP.
 - b. **Task Name:** Rqst Approval: **2- SBA Finance - FS (Funding Source)**
 - **Required Action:** Upload the following to receive a State funding source for the Program Income:
 - A grant award showing that program income is allowed.
 - A spreadsheet showing revenue received in Peoplesoft Financials.

- A Funding Source Request Form that includes the Assistance Listing Number (ALN, formerly known as Catalog of Federal Domestic Assistance, or CFDA) associated with the Federal grant for which the program income is authorized.
2. Completing these two automatic tasks will trigger the approval process with SBA. With the completion of the **Rqst Approval: 2- SBA Finance - FS (Funding Source)** task, the SBA representative will provide the Indiana State Agency its Funding Source Number/ID for the Euna project and grant.
- The Funding Source Number/ID will be communicated to the Indiana State Agency in two ways:
 - First, within an automatic Euna Grants Network generated email indicating that the **Rqst Approval: 2- SBA Finance - FS (Funding Source)** task has been completed and approved by SBA. In that email, there is a **Notes** section where the SBA representative will enter the Funding Source Number/ID.
 - Additionally, the SBA representative will enter the Funding Source Number/ID in the **Internal Grant ID** field within the **Contracts and Accounts** tab of the Euna Grants Network project. The Funding Source Number is represented as Allocating BU – Funding Source – Owning BU (where BU = Business Unit).

Program Income Adjustments

See [Section 5 – Award Adjustment/Award Amendment](#) for adjustment guidance.

In addition to creating the [Federal Funding Source Adjustment Request task](#), when sending the adjustment task for approval, please attach the following:

- i. Description of Program Income adjustment
- ii. Receipt of Revenue documentation
- iii. New Funding Source Request Form

Conclusion

Once the term of the grant has ended and the objectives of the grant have been met, the Agency Euna user should review the [State of Indiana Euna Grants Network Policy: Grant Closeout in Euna and PeopleSoft](#) for instructions on how to close out their award in Euna Grants Network and in PeopleSoft.

If the funding is going to be utilized for an Indiana State Agency grant program, then the Agency Euna user should review the Grantor user guides starting with [State of Indiana Euna User Guide - Grantor Creating a Solicitation](#).

Definitions

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

Agreement – May also be referred to as grant agreement. It is a legal instrument executed to provide financial assistance to a Grantee/Subrecipient. See Notice of Award (NOA).

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

Approval Groups – Groups of State of Indiana employees responsible for approving tasks e.g., State Budget Agency (SBA) 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).

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.

Budget Period – The time interval from the start date of a funded portion of an award to the end date of that funded portion during which recipients are authorized to expend the funds awarded, including any funds carried forward or other revisions.

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.

Competitive Funding – Funding where the Grantor may select the Grantee(s) from among all eligible Grantees/Applicants; may decide to make or not make an award based on the programmatic, technical, or scientific content of an application; and can decide the amount of funding to be awarded.

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

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

Discretionary Funding – See Competitive Funding.

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

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

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 Euna Grants Network, depending on the requirements of each grant program.

Grant Agreement – See Agreement.

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 Stage – The status of a Grantee project and grant in Euna Grants Network. There are eleven Grant Stages in Euna Grants Network. They are:

- Under Consideration – the Indiana State Agency is vetting the grant program internally to consider if it will apply for the grant.
- Will Not Apply – the Indiana State Agency decided to pursue the grant program but eventually did not apply.
- Will Not Pursue – following the Indiana State Agency's internal vetting process, the decision was made not to pursue the grant program.
- Award Projected – the Funder/Grantor informed the Indiana State Agency that its project was awarded without funding allocated to it.
- Application Preparation – the Indiana State Agency is developing its application for submission.
- Application Submitted – the Indiana State Agency submitted an application to the grant program.
- Not Awarded – the Indiana State Agency received a non-award notification from the Funder/Grantor.
- Implementation – post-award when reporting starts on the awarded project and grant.
- Grant Awarded – the Indiana State Agency received an award notification with funding for its submitted application.
- Funding Allocated – an awarded project and grant provides funding to other Indiana State Agencies through specific functionality in Euna Grants Network.
- Grant Closeout – after Implementation, the process of finalizing the funding received and expended along with submission of any final reports.

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

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 Euna Grants Network.

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

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](#)).

Memorandum of Understanding (MOU) – Considered formalized written documents between State agencies that involve programmatic and/or fiscal issues and enunciate mutual understandings, agreements, duties, responsibilities, policies, procedures, timeframes, and other matters as necessary and appropriate ([SBA FMC 3.4](#)).

Non-Competitive Funding – Funding in which the awarding agency has selected the Recipients and/or amount of funding through formula, criteria, or non-competitive means.

Notice of Award (NOA) – A legal document notifying the Recipient that an award has been made and funds may be requested from the awarding agency.

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

Pass-Through Entity – The non-Federal entity that provides a subaward to a Subrecipient to conduct part of a Federal program.

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.

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.

Project – See Grantee Project.

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

Project Period – See Period of Performance.

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

Subaward – An award provided by a Pass-Through Entity to a Subrecipient for the Subrecipient part of a Federal award received by the Pass-Through Entity.

Subrecipient – An entity that receives a grant from an Indiana State Agency utilizing Euna 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.

Unique Entity Identifier (SAM) or UEI – A non-federal entity is required to have a UEI to apply for, receive, and report on a federal award. A UEI may be obtained from www.sam.gov.

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) approval or financial reports with/without payment/reimbursement requests from Subrecipients.

Appendix A – Grant Awarded Fields

Euna Grants Network and SBA Required Fields and Sources

The following fields are required by either Euna Grants Network or SBA and have specific data that is required to be entered by an Agency Euna user as described.

Euna Grants Network Data Field	Data to be Entered
Internal Grant Name	Reserved for SBA usage. Leave this field blank.
Do you consider this a competitive grant?	“Yes” is a grant that was reviewed and scored by the funder for award. “No” is a grant that was formula-based.
Award Notification:	Enter the date of the NOA. If an agreement, enter the date of the last signature.
Awarded \$:	The award amount that the Indiana State Agency has the authority to draw and spend from the funder.
Match Required:	Defaulted by Euna Grants Network dependent on the NOFO requirement.
If Yes, Match Type:	Cash, In-Kind, Cash/In-Kind
Cash Match \$:	The amount of cash the Indiana State Agency or others are providing for the grant match.
In-Kind Value:	The value of the non-cash contribution of goods and services by the Indiana State Agency or others for the grant match.
Contract Start Date:	The Budget Period Start Date as stated in the NOA or agreement. If only a period of performance/performance period/project period is stated, it is the Start Date of it.
Contract Close Date:	The Budget Period End Date as stated in the NOA. If only a period of performance/performance period/project period is stated, it is its End Date.
Award Type:	Advance Payment is a lump sum allocation. Reimbursement is when the Indiana State Agency must incur the expense and submit to the funder for payment.
UEI:	The Unique Entity Identifier (UEI) assigned by the General Services Administration (GSA) SAM.gov.
Grantor Contract Number:	The unique identifier for the award or agreement provided by the funder e.g., FAIN, Grant Award Number, Grant Number, Award Number, Document Number, etc.
Grant Tags:	The tags selected in the earlier Stages of Under Consideration Stage, Application Preparation Stage, and Application Submitted Stage will carry forward to Grant Awarded Stage. The Agency Euna user should review and make any necessary updates.

Euna Grants Network Data Field	Data to be Entered
Notes:	Should include project period estimate (length of entire project and cumulative funded amount), any information regarding using the funding for a pass-through grant program, and/or any other information that should be shared with SBA and/or internally with the Project Team at this point.
Are awarded funds to be available for use as pass-through funding? If Yes, Amount to earmark for pass-through funding:	Defaults to “No” which means that this funding is not going to be used for a grant program and have Subrecipients.
	“Yes” means that the Indiana State Agency will use all or part of this funding for a grant program and have Subrecipients.
	Enter the amount to be used for the grant program. The amount cannot be more than the Awarded \$ entered. An Agency Euna user will have the ability to update this amount as needed through the grant term.
Are awarded funds to be available for allocation to sub-projects?	Defaults to “No” and should remain “No” as the State of Indiana is not using this functionality at this time.
Attach Files:	Notice of Award/agreement and the Funding Source Request Form are required to be uploaded. Size restrictions for attachments: 40 MB maximum per file.

Appendix B – Project Dashboard Guide

Euna Project Dashboard Guide

The Project Dashboard in Euna Grants Network acts as a centralized location to manage a project throughout all grant stages. The Agency Euna user can do this by utilizing various tabs within the Project Dashboard.

Overview	Documents	Grant Lifecycle	Goals & Metrics	Budgets	Contracts & Accounts	Spending	History
----------	-----------	-----------------	-----------------	---------	----------------------	----------	---------

Overview






The main page for the project and grant where the Agency Euna user can see the current stage of the project and grant and any related stage information (e.g., **Application Due Date**, **Awarded** and **Match** amounts, etc.), **Project Team** members, **Available Actions**, **Pending Tasks**, **Completed Tasks**, **Approval History**.

Documents



This tab displays files organized by grant stage and all documents associated with the project. Documents may be uploaded via an assigned task, as part of the project creation, moving from one stage to another, or manually.

Project Documents

Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021

US17341 Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021						 Minimize
Stage	Completed On	Manage Files	Download Files	Saved On	Saved By	
Application Submitted	08/02/2023					
			 Grant Application (25.1 Kb)	08/03/2023	A. Eulano	
Application Submitted Task	08/02/2023					
Application Submitted (08/02/2023)						
No files associated with this stage.						

To manually add a document at the current, or any previous, stage:

- 1) Select the *Manage Files Icon* .
- 2) Drag or browse to select a file from Agency Euna user's computer.
- 3) Once the file is uploaded, select the *Close button*  to close the pop-up window.

Manage Files

Drop files here to upload, or [browse to select](#).

Search:

Filename

Uploaded By

Upload Date

Size

Actions

No data available in table

Showing 0 to 0 of 0 entries

Close

Project Dashboard Guide: Grant Lifecycle Tab




This tab displays the progression of a project and grant by the stages (**Under Consideration Stage**, **Application Preparation Stage**, **Application Submitted Stage**, **Grant Awarded Stage**, **Implementation Stage**, and **Grant Closeout Stage**). Each stage may have files, notes, or **Grant Tags** associated with them.

Grant Lifecycle Report

Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021



US17341 Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021							
Stage	Completed On	Completed By	Files	View/Edit	Last Updated On	Created On	Notes
Application Preparation	08/03/2023	Project Lead				08/03/2023	

To make changes to a grant stage:

- 1) Click the *View/Edit Icon*  for the **Stage** to be changed.
- 2) The appropriate stage **Complete Status Form** will appear and an Agency Euna user will utilize the different options changing the needed information, including **Grant Tags**, additional **Notes**, and adding files (same process as in the **Documents** tab).
- 3) Select the *Save > button*  or the *Cancel > button*  to exit this screen to return to the **Grant Lifecycle** page.

Project Dashboard Guide: Goals and Metrics

Creating a Project Goal

- 1) Select the *+Open button*  on the right-hand side of the **Project Goals** banner. Clicking on the *Create Goals button*  will display a new pop-up window for creating a goal.

Add Project-Grant Goal

Instructions: Complete the form to add a goal for your project-grant.

Title: *

255 characters left

Reports To: *

☐ Organization ☐ Department ☐ Project ☒ None

Parent Goal:

None

Type: *

Goal

Target: *

0

Target Label: *

(shown on reports as: 0)

Fiscal Year: *

2023

Goal Reporting Audience:

☐ Public ☐ Internal / Admin. ☐ Press ☐ Other External

Description: *

1000 characters left


Cancel


Save

Save & Add Another

Creating grant goals is essential for helping to meet contractual obligations for the grant funds you receive. Performance metrics can be created and associated with your project grant goals to report transparent progress. Your grant goals can be associated your project, department and organization goals using 'Reports To' and 'Parent Goal'. This allows your grant goal to transparently contribute to top level initiatives for reporting in your organization.

Euna Grants Network Field	Display
Title	The title of the goal, a 255-character limit
Reports To	Radio button selection indicating how to relate this new goal to an existing goal. At the Project level, you could choose <i>Department</i> or <i>Organization</i> or <i>None</i> . This choice helps you build a parent/child relationship between goals. Making a choice other than None here will enable the next field, Parent Goal.
Parent Goal	Disabled by default if a choice (other than <i>None</i>) is made in Reports To. The dropdown menu will populate with existing goals to build a parent/child relationship.
Type	The dropdown menu choices include: <i>Objective</i> , <i>Priority</i> , <i>Goal</i> , <i>Output</i> , <i>Outcome</i> , <i>Other</i> (Goal is the default). If <i>Other</i> is selected, a new text field appears, below type, with a label of Custom Type limited to 20 characters. This allows an Agency Euna user to create a custom goal type not listed in the dropdown menu.
Target	A numerical value desired to achieve by this goal. This field is limited to a max value of 9,999,999.
Target Label	Text that describes the previously entered target. This field allows for 20 characters of text with no special characters, commas, or dashes.
Fiscal Year	A dropdown menu showing the previous 15 years and the next 15 years. Default selection is current year.
Goal Reporting Audience	These selections represent an audience tag that can be filtered on during the reporting process.
Description	A free form text area with 1,000 characters maximum used to describe the goal in greater detail.



- 2) Selecting the *Cancel > button*  will discard all entries and close the Add a Project Goal pop-up window.

Selecting the *Save > button*  will validate that all required entries have been entered and close the pop-up window displaying the newly entered goal in the grid.

The *Save & Add Another > button*  works similarly to the Save > button, but instead of showing the newly entered goal in the grid, it will automatically open another Add Project Goal pop-up window.

Editing a Project Goal

To make changes to existing goals:

- 1) On the Goals & Metrics page click the *+Open button*  located in the **Project Goals** bar. Then click the *Edit button*  in the upper right corner of the **Project Goals** view.



- 2) Each existing goal title will now become a clickable hyperlink and when the goal title is selected it will open the **Edit Project Goal** window pre-populated with the current goal values.

The screenshot shows the 'Project Goals' window. At the top, there's a 'Minimize' button. Below it, a 'Show Archived?' checkbox and 'Add Goal' and 'Done' buttons. The main area is titled 'Goals' and shows '5 goals displayed'. A search bar is present. Below is a table with columns: Type, Title, Description, Year, Target, Current, and Actions. The table contains one row: Type: Goal, Title: [Goal #1](#) (highlighted with a red box), Description: Test, Year: 2023, Target: 100 Beneficiaries, Current: 0 Beneficiaries, and an Actions button (gear icon). At the bottom, it says 'Showing 1 to 1 of 1 goals' and '* Bold title designates contributing goals'. Navigation buttons 'Previous', '1', and 'Next' are at the bottom right.

- 3) From this window edit any of the fields and then click the *Save > button* **Save >** or *Cancel > button* **Cancel >**.

The screenshot shows the 'Edit Project Goal' window. It starts with instructions: 'Complete the form to edit this goal for your project.' The form fields include: Title (Goal #1, 248 Characters Left), Reports To (Organization, Department, None - None is selected), Parent Goal (None), Type (Goal), Target (100), Target Label (Beneficiaries, shown on reports as: 100 Beneficiaries), Fiscal Year (2023), Goal Reporting Audience (Public, Internal / Admin., Press, Other External - Public and Internal / Admin. are selected), and Description (1000 Characters Left). A yellow callout box explains: 'When you create project goals, you can associate your goal to your department and organization goals using Reports To and Parent Goal. This allows your project to transparently contribute performance progress to top level initiatives for reporting in your organization.' At the bottom are 'Cancel >' and 'Save >' buttons.

- 4) Returning to the **Project Goals** view, click the *Done button* **Done** in the upper right corner to exit edit mode.

The screenshot shows the 'Project Goals' window after editing. The 'Done' button in the upper right corner is highlighted with a red box. The table now shows a goal titled 'Test Goal' (highlighted with a blue box) instead of 'Goal #1'. All other details (Description: Test, Year: 2023, Target: 100 People, Current: 0 People) remain the same. The rest of the interface is identical to the previous screenshot.

Grant Goals and Metrics

Creating a Grant Goal

- 1) Select the **+ Open button**  on the right-hand side of the **[Grant Title]** banner. Clicking on the **+ Create Goals button**  will display a new pop-up window for creating a goal.

Add Project-Grant Goal
x

Instructions: Complete the form to add a goal for your project-grant.

Title: *

255 Characters Left

Reports To: *
☐ Organization
☐ Department
☐ Project
☒ None

Parent Goal:
 None

Type: *
 Goal


Target: *
 0


(shown on reports as: 0)



Target Label: *

Creating grant goals is essential for helping to meet contractual obligations for the grant funds you receive. Performance metrics can be created and associated with your project grant goals to report transparent progress. Your grant goals can be associated your project, department and organization goals using 'Reports To' and 'Parent Goal'. This allows your grant goal to transparently contribute to top level initiatives for reporting in your organization.

Euna Grants Network Field	Display
Title	The title of the goal, a 255-character limit
Reports To	Radio button selection indicating how to relate this new goal to an existing goal. At the Project level, you could choose <i>Department</i> or <i>Organization</i> or <i>None</i> . This choice helps you build a parent/child relationship between goals. Making a choice other than <i>None</i> here will enable the next field, Parent Goal.
Parent Goal	Disabled by default if a choice (other than <i>None</i>) is made in Reports To. The dropdown menu will populate with existing goals to build a parent/child relationship.
Type	The dropdown menu choices include: <i>Objective</i> , <i>Priority</i> , <i>Goal</i> , <i>Output</i> , <i>Outcome</i> , <i>Other</i> (Goal is the default). If <i>Other</i> is selected, a new text field appears, below type, with a label of Custom Type limited to 20 characters. Allowing an Agency Euna user to create a custom goal type not listed in the dropdown menu.
Target	A numerical value desired to achieve by this goal. This field is limited to a max value of 9,999,999.
Target Label	Text that describes the previously entered target. This field allows for 20 characters of text with no special characters, commas, or dashes.
Fiscal Year	A dropdown menu showing the previous 15 years and the next 15 years. Default selection is current year.
Goal Reporting Audience	These selections represent an audience tag that can be filtered on during the reporting process.
Description	A free form text area with 1,000 characters maximum used to describe the goal in greater detail.



- 2) Selecting the *Cancel > button*  will discard all entries and close the **Add a Project Goal** pop-up window.

Selecting the *Save > button*  will validate that all required entries have been entered and close the pop-up window displaying the newly entered goal in the grid.

The *Save & Add Another > button*  works similarly to the *Save > button*  but instead of showing the newly entered goal in the grid, it will automatically open another **Add Project Goal** pop-up window.

Editing a Grant Goal

To make changes to existing goals:

- 1) On the Goals & Metrics page click the *+Open button*  located in the **Grant Goals** bar. Then click the *Edit button*  in the upper right corner of the **Grant Goals** view.



FD4720 California Health Care Foundation (CHCF) (California) - FY 2023

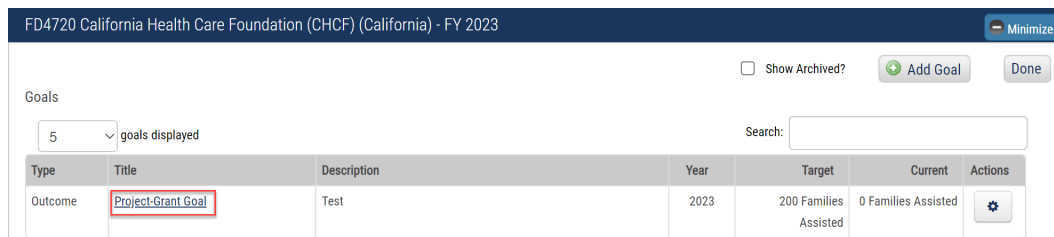
Goals

5 goals displayed

Search:

Type	Title	Description	Year	Target	Current
Outcome	Project-Grant Goal	Test	2023	200 Families Assisted	0 Families Assisted

- 2) Each existing goal title will now become a clickable hyperlink and when the goal title is selected it will open the **Edit Grant Goal** window pre-populated with the current goal values.






FD4720 California Health Care Foundation (CHCF) (California) - FY 2023

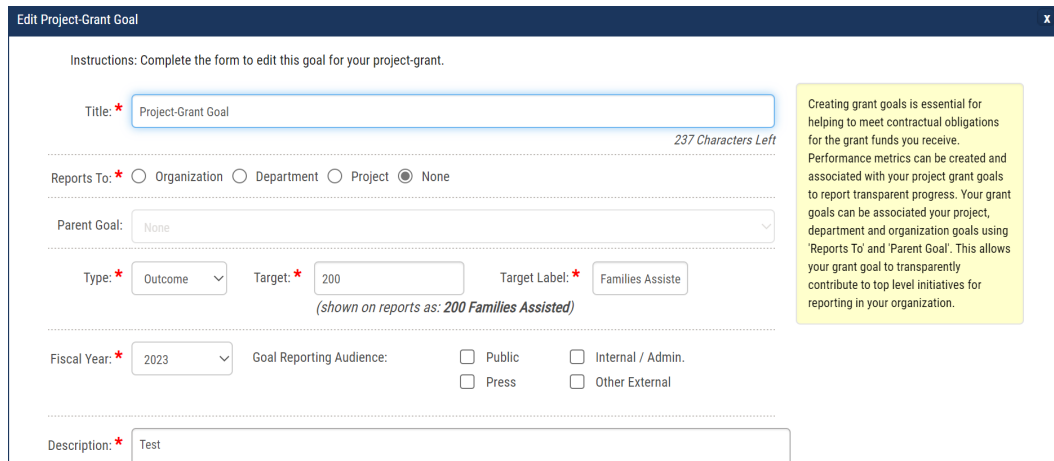
Goals

5 goals displayed

Search:

Type	Title	Description	Year	Target	Current	Actions
Outcome	Project-Grant Goal	Test	2023	200 Families Assisted	0 Families Assisted	

- 3) From this window, edit any of the fields and then click the *Save > button*  or *Cancel > button* .



Instructions: Complete the form to edit this goal for your project-grant.

Title: * 237 Characters Left

Reports To: * ☐ Organization ☐ Department ☐ Project ☒ None

Parent Goal:

Type: * Target: * Target Label: *
(shown on reports as: 200 Families Assisted)

Fiscal Year: * Goal Reporting Audience: ☐ Public ☐ Internal / Admin. ☐ Press ☐ Other External

Description: *

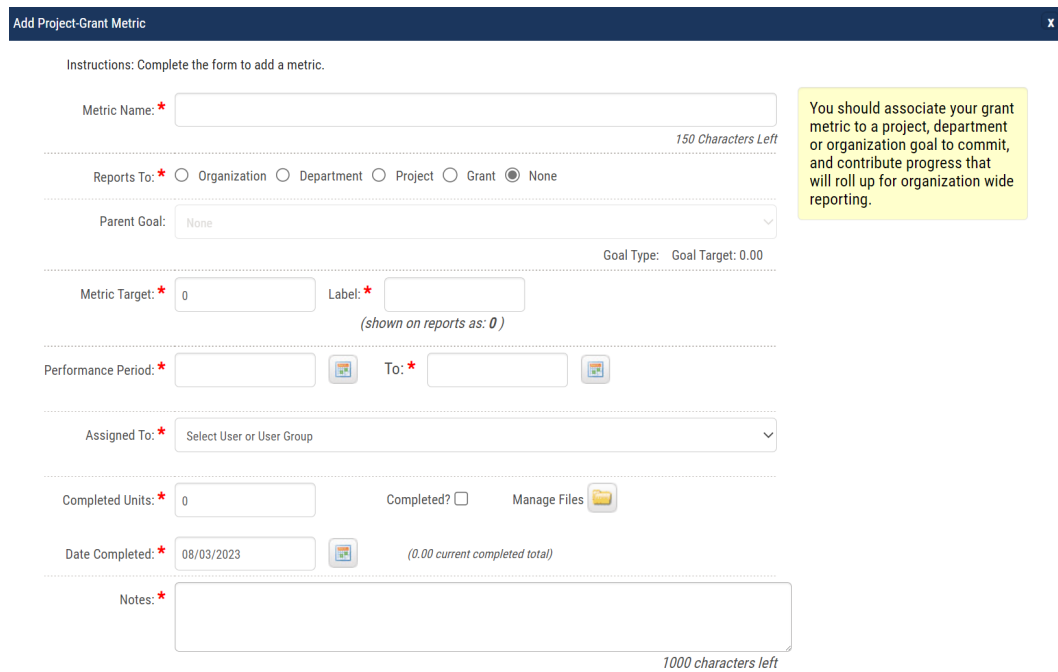
Creating grant goals is essential for helping to meet contractual obligations for the grant funds you receive. Performance metrics can be created and associated with your project grant goals to report transparent progress. Your grant goals can be associated your project, department and organization goals using 'Reports To' and 'Parent Goal'. This allows your grant goal to transparently contribute to top level initiatives for reporting in your organization.

- 4) Returning to the **Grant Goals** view click the *Done* button  to exit edit mode.




Creating a Metric


- 1) Clicking the **+Create Metrics**  will display a new pop-up window for creating a metric.




Euna Grants Network Field	Display
Metric Name	The title of the metric, a 150-character limit
Reports To	Radio button selection indicating how to relate this new goal to an existing goal. This choice helps you build a parent/child relationship between goals. Making a choice other than <i>None</i> here will enable the next field, Parent Goal.
Parent Goal	Disabled by default if a choice (other than <i>None</i>) is made in Reports To. The dropdown menu will populate with existing goals to build a parent/child relationship.
Metric Target	A numerical value desired to achieve by this goal. This field is limited to a max value of 9,999,999.

Label	Text that describes the previously entered target. This field allows for 20 characters of text with no special characters, commas, or dashes.
Performance Period (From and To)	An input for the start and end date of the performance period in the format of MM/DD/YYYY. Clicking the calendar button will display a calendar picker for the date.
Assigned To	A dropdown menu that includes project team members.
Completed Units	Represents the amount of completed units. At creation the value defaults to 0 but can be changed if the metric is already in process.
Completed?	Designates if the metric evaluation has concluded.
Manage Files	Allows for the upload, removal, and management of external documents related to this metric.
Date Completed	Date of the latest edit or measurement of the metric.
Notes	A free form text area with 1,000 characters maximum used to describe the metric in greater detail.






- 2) Selecting the *Cancel > button*  will discard all entries and close the Add a Metric pop-up window.

Selecting the *Save > button*  will validate that all required entries have been entered and close the pop-up window displaying the newly entered metric in the grid.

The *Save & Add Another > button*  works similarly to the *Save > button*  but instead of showing the newly entered metric in the grid, it will automatically open another **Add Metric** pop-up window.

Editing a Metric

To make changes to an existing metric:

- Select the *Edit button*  in the upper right corner of the metrics view.
- Each existing metric title will be a clickable hyperlink that when selected will open a window pre-populated with the current metric values.
- While in edit mode update the *Completed Units* and the *Date Completed* to capture the current activity during the defined period.
 - Selecting the *History Icon*  in the grid will display all previously entered Completed Units and Date Completed values.
- In the **Edit Metric** window select the *Save > button*  or *Cancel > button*  to close and then click the *Done button*  to exit edit mode.

Metrics ☐ Show Archived? Add Metric Done

5 metrics displayed Search:

Metric	Target	Current	Progress	As Of	Performance Period	Assigned To	Files	Notes	History	Actions
<u>Project-Grant Metric</u>	2,500 Units	50 Units	2.00%	08/30/2023	03/01/2023 - 08/31/2023	SBA Financial	0 files			

Showing 1 to 1 of 1 metrics * Bold title designates contributing metrics

Performance Period: * To: *

Assigned To: *

Completed Units: * Units ☐ Completed?


Date Completed: * (50.00 Units current completed total)

Notes: * 996 Characters Left


Cancel Save

Read-Only Metric Views and Options

Metric	Target	Current	Progress	As Of	Performance Period	Assigned To	Files	Notes	History
Project-Grant Metric	2,500 Units	50 Units	2.00%	08/30/2023	03/01/2023 - 08/31/2023	SBA Financial	0 files		

The **Files Icon**  will open a window allowing Agency Euna users to review and download documents relevant to the metric.

The **Notes Icon**  will display available notes associated with the metric.

The **History Icon**  will display all of the metric progress and version history.

Metric Action – Deleting a Metric

A metric may only be deleted if it has no links to other goals and no progress reported. Attempting to delete a metric where links or progress is recorded will stop the deletion and the Agency Euna user will get a red error notice “This metric can’t be deleted. It has reported progress. You can only archive this metric.” If a metric can be successfully deleted, it is a ‘soft delete’ and not permanently deleted from our system. However, restoring a deleted metric will require the Euna Customer Success Team. [Contact the SBA Grants Management Team](#) for assistance. Deleted metrics disappear from Euna Grants Network and are not accessible via reports.

- 1) Select the **Edit button**  in the upper right corner of the metrics view. From the **Actions** menu select the **Settings Icon** , choose **Delete**.

☐ Show Archived?
 Add Metric
Done

Metrics

5
▼
metrics displayed

Search:

Metric	Target	Current	Progress	As Of	Performance Period	Assigned To	Files	Notes	History	Actions
Project-Grant Metric	2,500 Units	50 Units	2.00%	08/30/2023	03/01/2023 - 08/31/2023	SBA Financial	0 files			<div> <div>⚙️</div> <div>Delete</div> <div>Archive</div> </div>

Showing 1 to 1 of 1 metrics
* Bold title designates contributing metrics

Metric Action – Archiving a Metric

Performing an archive is relatively simple and removes the metric from an ‘active’ status to an ‘archived’ status. Archived metrics are still accessible to Agency Euna users by clicking on the *Show Archived* checkbox.

When a metric is archived, the status of the metric is changed and put into the archive view. Archived metrics do not show up on active dashboards unless you choose *Show Archived* and archived metrics also do not show up on reports. The system will provide a confirmation message that the metric was successfully archived.

- 1) From the *Actions* menu, choose *Archive*.

☐ Show Archived?
 Add Metric
Done

Metrics

5
▼
metrics displayed


Search:

Metric	Target	Current	Progress	As Of	Performance Period	Assigned To	Files	Notes	History	Actions
Project-Grant Metric	2,500 Units	50 Units	2.00%	08/30/2023	03/01/2023 - 08/31/2023	SBA Financial	0 files			<div> <div>⚙️</div> <div>Delete</div> <div>Archive</div> </div>

Showing 1 to 1 of 1 metrics
* Bold title designates contributing metrics

Metric Action – Restoring From Archive

Performing a restore moves the archived metric to an “active” status. It’s relatively easy to archive and restore a metric. Restored metrics show up in the normal “active” view in dashboards.

- 1) From the *Actions* menu click the *Settings Icon*  (in *Show Archived* view), choose *Restore* a metric.

☒ Show Archived?
 Add Metric
Done

Metrics

5
▼
metrics displayed

Search:

Metric	Target	Current	Progress	As Of	Performance Period	Assigned To	Files	Notes	History	Actions
Project-Grant Metric	2,500 Units	50 Units	2.00%	08/30/2023	03/01/2023 - 08/31/2023	SBA Financial	0 files			<div> <div>⚙️</div> <div>Delete</div> <div>Restore</div> </div>

Showing 1 to 1 of 1 metrics
* Bold title designates contributing metrics

Project Dashboard Guide: Budgets

Budgets

The **Budget** tab is used to create and manage budget data for the project and grant. This section will not be managed or updated by Agency Euna users; data will be interfaced, in its entirety, nightly with PeopleSoft finance information.


Contracts & Accounts

This tab contains summary-level information that was entered at the time of award regarding the awarded grant for the project. It contains the following data elements:

Euna Grants Network Field	Display
Stage	Current grant stage of the project.
Awarded	The current awarded amount.
Match	Amount, if any, required in Match.
Award Notification Date	The date the grant was awarded.
Contract Start Date	The budget period start date. If only a period of performance/performance period/project period, its start date.
Contract Close Date	The budget period end date. If only a period of performance/performance period/project period, its end date.
Award Type	Either Advanced Payment or Reimbursement selected.
Award Documents	Opens the Documents tab to view all saved files by grant stage.
Grantor Contract Number	The unique award identifier like the Federal Award Identification Number or FAIN from a Federal funder.
UEI	The Indiana State Agency's Unique Entity Identifier (UEI).
DUNS	Not required by either Euna Grants Network or SBA.
Internal Grant ID	SBA-entered assigned Funding Source Number/ID
Internal Grant Name	Reserved for SBA usage. Leave this field blank.
Notes	Additional information that may need to be tracked at a summary level for the project and grant.

Editing Contracts & Accounts

This tab is only populated once a project and grant are at **Grant Awarded Stage**.

- 1) Select the *Edit button*  to enable changes to any of the fields. Agency Euna users must never edit the Internal Grant ID.

Stage: Implementation Awarded: \$5,000,000.00 Match: \$0.00


Grant Contract Summary

Award Notification Date: 08/08/2023


Contract Start Date:

Contract Close Date:

Award Type: ☐ Advance Payment ☒ Reimbursement

Award Documents: 

Grantor Contract Number:

UEI: 

DUNS Number:

Revenue & Expense Accounts

Search:

Account Name	Number	Type
No data available in table		

1 - 0 of 0 Accounts


← Previous Next →

Grant Identifiers

Internal Grant ID:

Internal Grant Name:

Notes





Edit


2) Select the **Save button**  or **Cancel button**  to exit edit mode.

Stage: Implementation Awarded: \$5,000,000.00 Match: \$0.00


Grant Contract Summary

Award Notification Date*: 08/08/2023 


Contract Start Date: 

Contract Close Date: 

Award Type*: ☐ Advance Payment ☒ Reimbursement

Award Documents: 

Grantor Contract Number:

UEI: 

DUNS Number:

Revenue & Expense Accounts

Add Edit Delete

Search:

Account Name	Number	Type
No data available in table		

1 - 0 of 0 Accounts

← Previous Next →

Grant Identifiers

Internal Grant ID:

Internal Grant Name:

Notes

Save **Cancel**

Import Accounts

Project Dashboard Guide: Spending

Spending

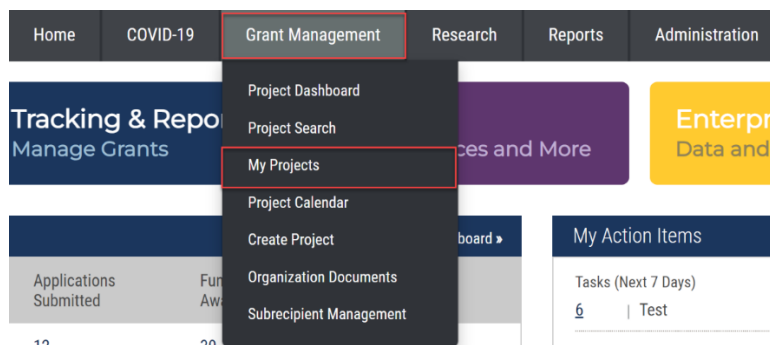
Associated with any *Scheduled Reports* where the Agency Euna user indicates that the report is a *Spending Report*. However, PeopleSoft is the financial record for the State of Indiana, so any information reported as part of a *Spending Report* should be reconciled with PeopleSoft.

Appendix C – Creating Simple Tasks

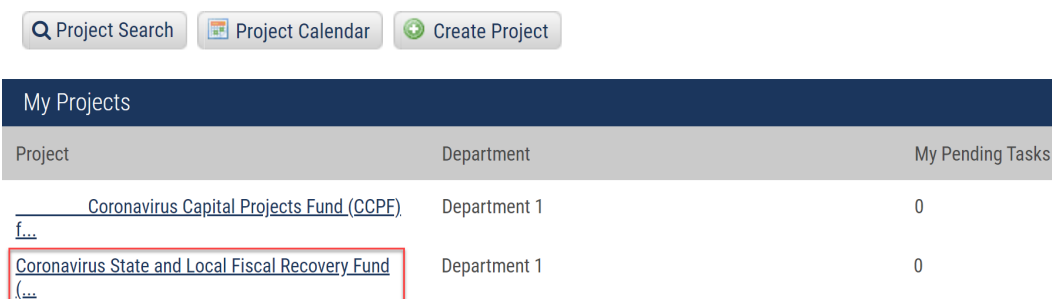
An Agency Euna user can create tasks within Euna Grants Network to align with the requirements of the funding and funder. These tasks can either be Simple or Advanced depending on the complexity of the task.


Utilize the Simple Tasks feature when setting up one-time reminders for project team members or ad-hoc requests and one-time reports from the funder. An example of this can be creating a reminder to set project and grant goals or metrics.

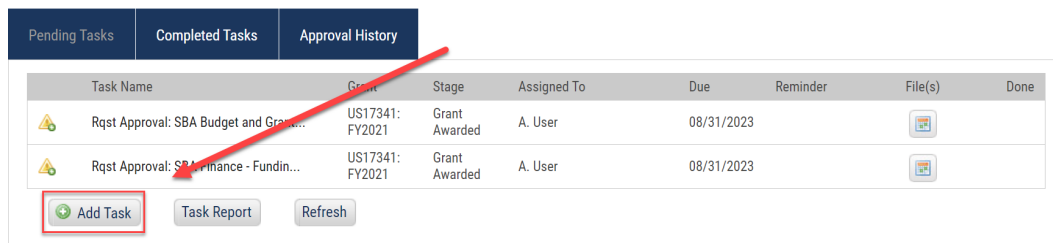
- 1) On the Euna Grants Network Homepage, the Agency Euna user will select *My Projects* from the **Grant Management** tab. From the list click on the name of the Euna Grants Network project that will be updated.




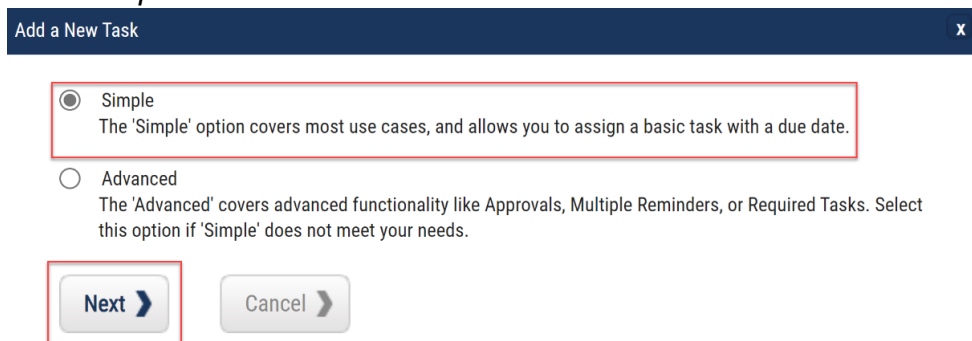
- 2) From the list click the name of the Euna Grants Network project to have a Simple Task added to it.
My Projects



- 3) On the **Project Dashboard** page click the + *Add Task* button  Add Task .



4) Then select *Simple* and click the *Next > button* .



5) The Simple Task Wizard will appear, then complete the following required fields:

a. **Task Type***:

- *Miscellaneous Task* will be selected to create an immediate task.
- *Scheduled Report* will only be available in post award grant stages (**Grant Awarded Stage**, **Implementation Stage**, and **Closeout Stage**) and should be chosen when using Simple Task for a funder or internal report task creation.

b. **Name***: Enter a name for the task e.g., Set Project and Grant Goals.

c. **Grant***: Select the grant to which the task applies.

- Since there is one project to one grant, one grant to one project relationship for Indiana State Agencies within Euna Grants Network, there will only be one grant listed to choose from here.

d. **Stage***: Select the grant stage to which the task applies. For example, if the task is being created while a project is at the **Application Submitted Stage** (which is after the **Under Consideration Stage** and **Application Preparation Stage**), an Agency Euna user will only be able to select the current stage, **Application Submitted Stage**, and those stages following it: **Grant Awarded Stage**, **Implementation Stage** and **Grant Closeout Stage**.

NOTE: If the Agency Euna user selected *Scheduled Report* for **Task Type*** and the current project and grant stage is **Grant Awarded Stage**, then the **Stage*** field will disappear, and the project and grant will move to the **Implementation Stage** once the task is saved.

e. **Task Scoring Rubric**: Leave at default, *None*.

f. **Assigned To***: Select the *Project Team* member or *User Group* to whom this task will be assigned.

g. **Due***: Enter the due date for this task.

- A **Reminder** can be set so the **Project Team** member or **User Group** assigned the task will receive emails from Euna Grants Network starting on the **Reminder** date entered and continuing daily until the task is completed.

h. **Task Description**: In the narrative box provide a brief description of the task and any additional guidance needed to complete the task.

Simple Task Wizard

Task Type*: a.

Select Task Type

Name*: b.

Grant*: c.

Select Grant

Stage*: d.

Select Stage

Task Scoring Rubric: e.

None

Assigned To*: f.

Select User or User Group

Due*: g.

Reminder:

Task Description: h.

Save >

Cancel >

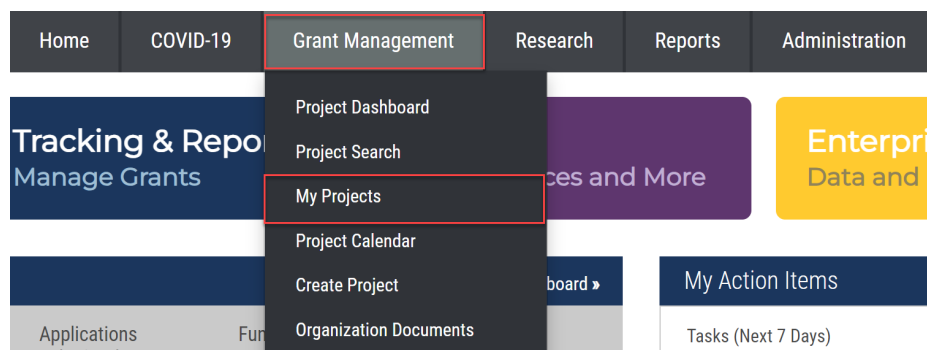
- 6) Then click the *Save > button* Save > and the newly created Simple Task will appear in the **Pending Tasks** section of the **Project Dashboard** page.

Pending Tasks	Completed Tasks	Approval History						
Task Name	Grant	Stage	Assigned To	Due	Reminder	File(s)	Done	
Simple Task	US17341: FY2021	Grant Awarded	SBA Finance	08/31/2023		<div></div>	<input type="checkbox"/>	

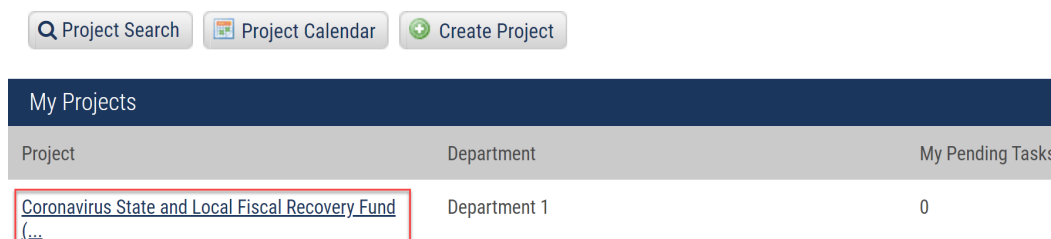
Appendix D – Creating Advanced Tasks

Utilize the **Advanced Task** feature when setting up recurring reminders or reports for **Project Team** members. An example of this can be setting reminders to set update progress on project and grant goals or metrics or quarterly financial and/or programmatic reports to the funder. For additional ways to manage the project and grant refer to [Appendix B – Project Dashboard](#).

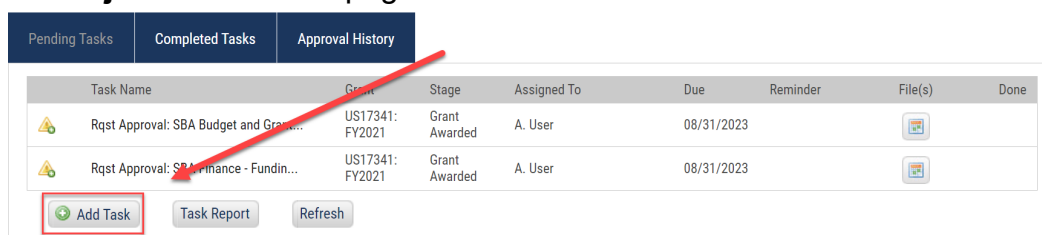
- 1) On the Euna Grants Network Homepage, the Agency Euna user will select *My Projects* from the **Grant Management** tab.



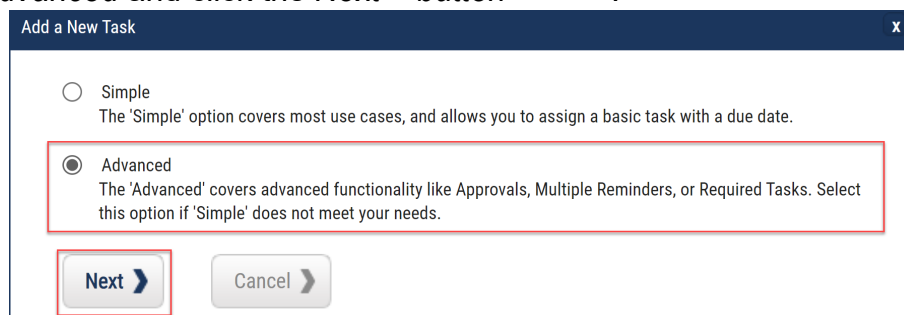
- 2) From the list, click the name of the Euna Grants Network project to have a Simple Task added to it.



- 3) On the **Project Dashboard** page click + *Add Task button* .




- 4) Select *Advanced* and click the *Next > button* .

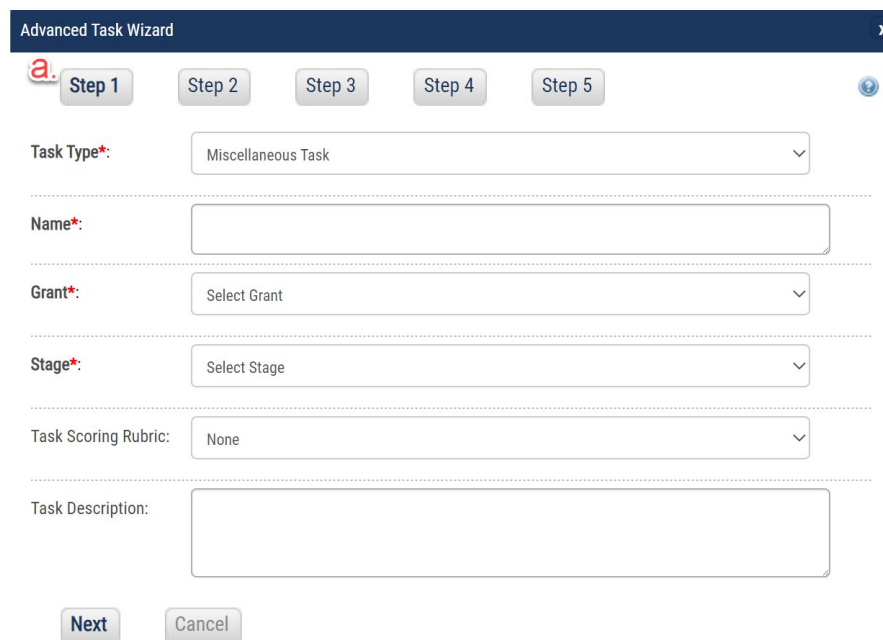


5) The **Advanced Task Wizard** window will appear:

a. **Step 1**

- **Task Type***:
 - *Miscellaneous Task* would be like the example provide, update progress on project and grant goals or metrics.
 - *Scheduled Report* will only be available in post award grant stages (**Grant Awarded Stage**, **Implementation Stage**, and **Closeout Stage**) and should be chosen when using Advanced Task for a funder or internal report task creation.
- **Name***: Enter a name for the task, e.g., Update Progress on Project and Grant Goals.
- **Grant***: Select the grant to which the task applies.
 - Since there is one project to one grant, one grant to one project relationship for Indiana State Agencies within Euna Grants Network, there will only be one grant listed to choose from here.
- **Stage***: Select the grant stage to which the task applies. At **Grant Awarded Stage**, an Agency Euna user will only see the current stage, **Grant Awarded Stage**, and those stages following it, **Implementation Stage** and **Grant Closeout Stage**.

NOTE: If the Agency Euna user selected *Scheduled Report* for **Task Type*** and the current project and grant stage is **Grant Awarded Stage**, then the **Stage*** field will disappear, and the project and grant will move to the **Implementation Stage** once the task is saved.
- **Task Scoring Rubric**: Not currently being utilized by SBA so leave at default, *None*.
- **Task Description**: In the narrative box provide a brief description of the task and any additional guidance needed to complete the task.
- Click the *Next > button* .




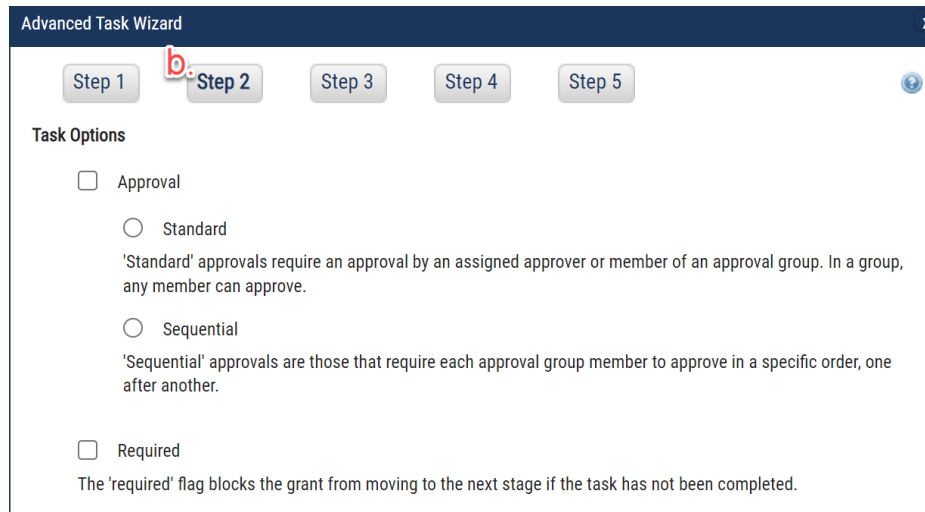
The screenshot shows the 'Advanced Task Wizard' window with a dark blue header and a close button (X). Below the header is a progress bar with five steps: Step 1 (active), Step 2, Step 3, Step 4, and Step 5. The form fields are as follows:

- Task Type***: A dropdown menu with 'Miscellaneous Task' selected.
- Name***: An empty text input field.
- Grant***: A dropdown menu with 'Select Grant' selected.
- Stage***: A dropdown menu with 'Select Stage' selected.
- Task Scoring Rubric**: A dropdown menu with 'None' selected.
- Task Description**: A large empty text area.

At the bottom of the form are two buttons: 'Next' (highlighted in blue) and 'Cancel'.

b. **Step 2**

- If **Task Type*** from **Step 1** was *Miscellaneous Task* then the Agency Euna user will see:
 - **Approval**
 - *Standard*: Requires approval by an assigned approver or member of an approval group. In a group, any member can approve.
 - *Sequential*: Requires each approval group member to approve in a specific order, one after another.
 - **Required** blocks the grant from moving to the next stage if the task has not been completed.
- If **Task Type*** from **Step 1** was *Scheduled Report*, then the Agency Euna user will only see:
 - **Required** blocks the grant from moving to the next stage if the task has not been completed.
- Click the *Next > button* .



Advanced Task Wizard

Step 1 Step 2 Step 3 Step 4 Step 5

Task Options

☐ Approval

☐ Standard

'Standard' approvals require an approval by an assigned approver or member of an approval group. In a group, any member can approve.


☐ Sequential

'Sequential' approvals are those that require each approval group member to approve in a specific order, one after another.

☐ Required

The 'required' flag blocks the grant from moving to the next stage if the task has not been completed.

c. **Step 3**

- If **Task Type*** from **Step 1** was *Miscellaneous Task* and *Approval* was selected for **Task Options** in **Step 2** then the Agency Euna user will see:
 - **Assigned To***: Utilize the dropdown menu to assign the task to one of the *Project Team Members* or *User Groups*.
 - **Designated for Approval**: Select task approval option and use the dropdown menu to select the appropriate *User* or *User Group*.
- If **Task Type*** from **Step 1** was *Miscellaneous Task* and nothing was selected for *Approval* on **Task Options** in **Step 2** then the Agency Euna user will see:
 - **Assigned To***: Utilize the dropdown menu to assign the task to one of the *Project Team Members* or *User Groups*.
- If **Task Type*** from **Step 1** was *Scheduled Report*, then the Agency Euna user will only see:
 - **Assigned To***: Utilize the dropdown menu to assign the task to one of the *Project Team Members* or *User Groups*.
- Click the *Next > button* .

d. **Step 4**

- **Due***: Enter the due date for this specific task.
 - Add a **Reminder** for the **Assigned To*** Agency Euna user. Again, the Agency Euna user will start to receive emails regarding the task on the **Reminder** date entered and will not end until the task has been completed.

- Click the *Next > button* .

e. **Step 5**

- **Task Recurrence**: Select the frequency in which this task will occur.
 - *Task does not repeat.*
 - *Task repeats*: If selected the following options will appear:
 - **Frequency***: Select either *Weekly* or *Monthly* from the dropdown menu.
 - **Interval***: A dropdown menu with weekly or monthly interval options depending on **Frequency** chosen, e.g., Every week, Every 2 weeks, Every month, Every 2 months, Every 3 months (quarterly), etc.
 - **On***: depending on **Frequency** chosen, either the days of the week will be listed for which day of the week the task repeats with one day needing to be selected or *A day of the month* with *Select Day* dropdown field or *The last day of the month* options for **Monthly Frequency**.
 - **Starting***: The previously specified **Due*** date will auto-populate in this field.
 - **Create***: Specify when this task will be created by Euna Grants Network from the dropdown choices:
 - *On due date*

- *One week before the due date*
- *Two weeks before the due date*
 - Click the *Create with a Reminder* checkbox if the Agency Euna user wants a reminder to start on the selected **Create*** date.

➤ **Until:** Enter the end date for this recurring task.

Advanced Task Wizard

Step 1 Step 2 Step 3 Step 4 Step 5

Task Recurrence

☐ Task does not repeat

☒ Task repeats

Frequency*: Monthly

Interval*: Select Interval

On*: ☒ A day of the month
Select Day

☐ The last day of the month

Starting*: 08/06/2023

Create*: On due date

☐ Create with a reminder

Until:

Previous Save Cancel

f. Then click the *Save button* **Save** to create the task.

Advanced Task Wizard

Step 1 Step 2 Step 3 Step 4 Step 5

Task Recurrence

☒ Task does not repeat

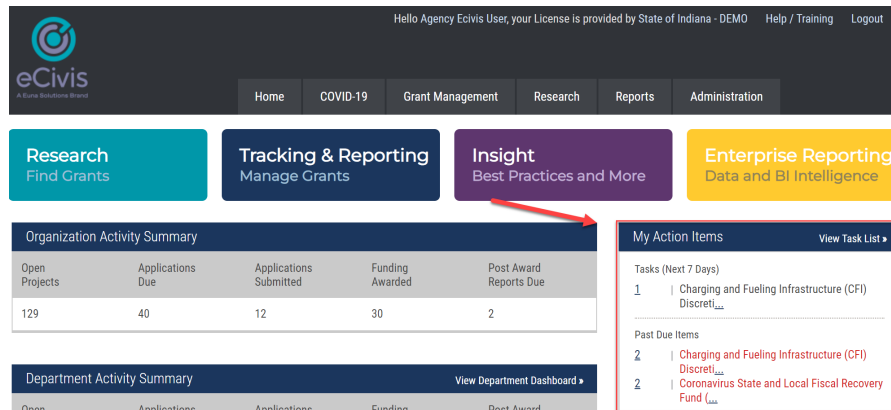
☐ Task repeats

Previous **Save** Cancel

NOTE: Task settings may be edited at any time by clicking the **Task Name** under **Pending Tasks** and accessing the **Advance Task Wizard** to update and save any of the changes to the Steps.

Appendix E – Completing Pending Tasks

- 1) On the Euna Grants Network homepage, the Agency Euna user will see their pending tasks in the **My Action Items** section. Click on the Tasks number link which represents the number of tasks assigned to the Agency Euna for the stated **Project Name**. This will navigate the Agency Euna user to the **Project Dashboard** page of the selected Tasks number/**Project Name**.



Organization Activity Summary

Open Projects	Applications Due	Applications Submitted	Funding Awarded	Post Award Reports Due
129	40	12	30	2

Department Activity Summary

Open	Applications	Applications	Funding	Post Award

My Action Items

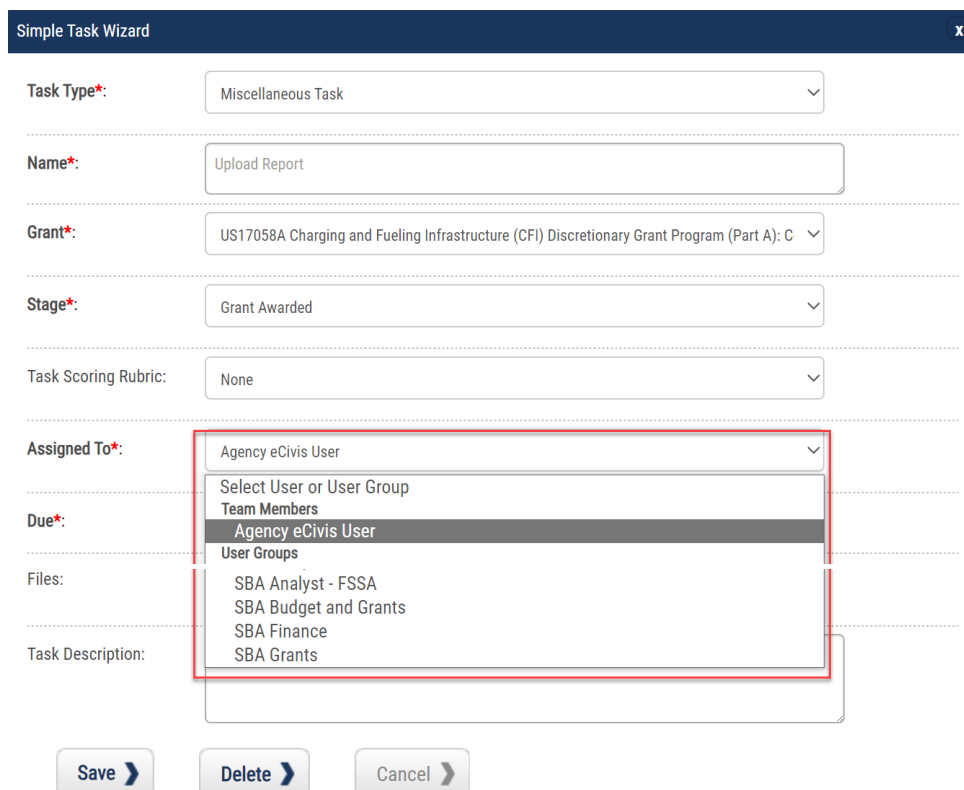
Tasks (Next 7 Days)

- 1 | Charging and Fueling Infrastructure (CFI) Discretionary Grant Program (Part A): C

Past Due Items

- 2 | Charging and Fueling Infrastructure (CFI) Discretionary Grant Program (Part A): C
- 2 | Coronavirus State and Local Fiscal Recovery Fund

- 2) On the **Project Dashboard** page, the **Pending Tasks** section will display all the tasks that are waiting to be completed. The **Assigned to** column will show the specific team member's name responsible for completing the task.
 - a. If the task must be re-assigned, click on the specific *Task Name* to open the **Simple/Advanced Task Wizard**, update the **Assigned To** field, and click the **Save > button** once updated.



Simple Task Wizard

Task Type*: Miscellaneous Task

Name*: Upload Report

Grant*: US17058A Charging and Fueling Infrastructure (CFI) Discretionary Grant Program (Part A): C

Stage*: Grant Awarded

Task Scoring Rubric: None

Assigned To*: Agency eCivis User

Due*:

Files:

Task Description:






Save > Delete > Cancel >


- 3) Once the task is assigned to the appropriate Agency Euna user, that Agency Euna user will click the *Done* checkbox to complete the task.


Pending Tasks

Completed Tasks


Approval History

Task Name	Grant	Stage	Assigned To	Due	Reminder	File(s)	Done
 Rqst Approval: SBA Budget and Grant...	US17341: FY2021	Grant Awarded	A. User	08/31/2023			<input type="checkbox"/>
 Rqst Approval: SBA Finance - Fundin...	US17341: FY2021	Grant Awarded	A. User	08/31/2023			<input type="checkbox"/>
Upload Report	US17341: FY2021	Grant Awarded	A. User	08/31/2023			<input type="checkbox"/>

 Add Task

 Refresh

NOTE: Only the **Assigned to** Agency Euna user will see the *checkbox* under the *Done* column. Otherwise, it will be blank for all other **Project Team** members.

- 4) The **Task Completion** form will appear and will vary based on the type of task.
- Completed By*** is the **Project Team** member who completed the task. This will default to the **Project Team** member that is assigned the task.
 - Completion Date*** defaults to the date the task is being saved and should be left alone.
 - Attach Files** field allows Agency Euna users to add any relevant documentation to support the task.
 - Notes** provides 1000 characters to provide any notes to support the task.
- 5) Once completed, click the *Save > button* .

Task Completion

Charging and Fueling Infrastructure (CFI) Discretionary Grant Program

Task:


Upload Report

Completed By *


Agency eCivis User

Completion Date *

07/31/2023





Attach Files:



Notes:

1000 Characters Left





Appendix F – Estimated Funding Source Guidance

The section specifies how Estimated Funding Sources are treated differently within Euna Grants Network.

Automatic Tasks (SBA Analyst and SBA Finance)

- Send **Rqst Approval: 1. SBA Analyst - FS/Match/Subgrant** task
- Leave **Rqst Approval: 2. SBA Finance - FS (Funding Source)** task
 - This automated task stays put until *actually* receive Grant Award

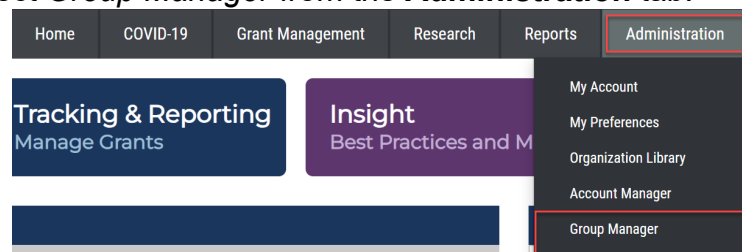
Create new “Estimated Funding Source Request” Approval Task to send for Estimate

- See [Appendix D – Creating Advanced Tasks](#)
- Assign SBA Finance as the Approval Group
- Attach previous year grant award
- SBA Finance inputs “estimate” or EST in the Internal Grant Name

Appendix G – Creating and Managing Approval Groups

This section describes how approval groups can be created to complete various tasks throughout the grant lifecycle. If multiple approvers are needed for a task, the Agency Euna user must contact their Agency’s Department Master Account Holder (DMAH) with detailed information to complete the following steps and create an approval group. Department-level Agency Euna users will not have access to create/edit groups in the Group Manager feature of the Euna Grants Network.

- 1) On the Euna Grants Network Homepage, the Department Master Account Holder (DMAH) will select *Group Manager* from the **Administration** tab.



- 2) Then click the + *Add New Group button*  to create a new user group in Euna Grants Network.

Group Manager

Groups can be created and managed so that tasks can be assigned to multiple people.



- 3) The **Add New Group** pop-up window will appear. Begin creating the new group by responding to the required fields.
- Group Name***: Group names must include the following information with a dash between each (agency specific information can be found in Section 15 of State of Indiana Euna Grants Network Policy and Procedures: Organization Funding):
 - 3-digit Indiana State Agency code (Business Unit)
 - Indiana State Agency Acronym
 - Division/Program Name
 - Function (i.e. Program, Finance, etc.)
 - Example: *057 – SBA - SLFRF - Finance*
 - See [Appendix H – State of Indiana Agencies, Acronyms, and BUs](#).
 - Description**: Purpose or reason for the approval group &/or members in the group.
 - Type**:
 - **Standard**: Requires approval by an assigned approver or member of an approval group. In a group, any member can approve.
 - **Sequential**: Requires each approval group member to approve in a specific order, one after another. Note: The “request more information” function only requests more information from the previous approver. It does not allow you to request information from the **Project Team** member that the task was originally assigned to.
 - Select from Departments, Users, and Groups**: Utilize these menus to locate and assign specific individuals or groups to a new group.
 - Locate the Agency Euna user by selecting the **Department** of the Agency Euna user.
 - A list of Agency Euna users within that **Department** will populate in the **Users** field.
 - If the **Type** is **Sequential**, additional **Groups** field will appear. This additional group field enables the Agency Euna user to incorporate previously created groups into the new approval group.
 - Highlight *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 selected *Users* or *Groups* at the top of the **Group Members** list will complete the first approval and then move down the list for the following approvals.

Add New Group

Group Name ^{a.} Description: ^{b.} Type ^{c.} ☐ Standard ☐ Sequential


Select from Department, Users, and Groups

Select one or more departments on the left to narrow the list of users on the right, or select from the list of user groups.

Departments: ^{d.} Users: Group Members:

Alpha
Bravo
Charlie
Delta
Department 1
Department 10
Department 11
Department 12

Save > Cancel >

- e. Once the new user group setup is complete, click the **Save > button**  to return to the **Group Manager** page. The newly created group will appear in the **Active Groups** table and be accessible when assigning tasks on the **Project Dashboard** page.

Group Manager

Groups can be created and managed so that tasks can be assigned to multiple people.



[Add New Group](#)

Active Groups




10 records per page Search:

Showing 1 to 8 of 8 records

	Group Name	Description	Type	Members	Last Updated	Last Updated By
1	SBA Grants	All Federal Grants Policy Analyst, Director of Federal Grants Policy and Management, and Deputy Director(s).	standard		07/20/2023	

- 4) To edit an **Active Group**, click on the *Group Name* and a **View Group** pop-up window will appear. Then click the **Edit Group > button**  to edit the group settings on the **Manage Group** page and click the **Save > button** .

View Group

4		Project Manager	Department 1,Department 2,Department 3,Department 4,Department 5,Department 6,Department 7,Department 8,Department 9,Department 10,Department 11,Department 12,Department 13,Department 14,Department 15,Department 16,Department 17,Department 18,Department 19,Department 20	Active
5		Grants Management Analyst	Department 1,Department 2,Department 3,Department 4,Department 5,Department 6,Department 7,Department 8,Department 9,Department 10,Department 11,Department 12,Department 13,Department 14,Department 15,Department 16,Department 17,Department 18,Department 19,Department 20,Alpha,Bravo,Charlie,Delta,Echo,Foxtrot	Active
6		Learning Specialist	Department 1,Department 2,Department 3,Department 4,Department 5,Department 6,Department 7,Department 8,Department 9,Department 10,Department 11,Department 12,Department 13,Department 14,Department 15,Department 16,Department 17,Department 18,Department 19,Department 20,Alpha,Bravo,Charlie,Delta,Echo,Foxtrot	Active

[Edit Group >](#) [Delete Group >](#) [Email Group >](#) [Cancel >](#)

- a. If needed, a Department Master Account Holder (DMAH) can also *Delete Group* or *Email Group*.

Appendix H – State of Indiana Agencies, Acronyms, and BUs

State of Indiana Agency Naming Conventions	Acronym	Business Unit (BU)
IN Adjutant General	AGO	110
IN Alcohol and Tobacco Commission	ATC	230
IN Archives and Records Administration	IARA	062
IN Arts Commission	IAC	705
IN Attorney General	ATG	046
IN Board of Animal Health	BOAH	351
IN Bureau of Motor Vehicles	BMV	235
IN Civil Rights Commission	CRC	258
IN Commission for Higher Education	CHE	719
IN Criminal Justice Institute	CJI	032
IN Department of Agriculture	ISDA	036
IN Department of Child Services	DCS	502
IN Department of Correction	DOC	615
IN Department of Education	DOE	700
IN Department of Environmental Management	IDEM	495
IN Department of Health	IDOH	400
IN Department of Homeland Security	DHS	385
IN Department of Insurance	IDOI	210
IN Department of Labor	DOL	225
IN Department of Natural Resources	DNR	300
IN Department of Toxicology	IDT	115
IN Department of Transportation	INDOT	800
IN Department of Veterans Affairs	DVA	160
IN Department of Workforce Development	DWD	510
IN Destination Development Corporation	IDDC	037
IN Economic Development Corporation	IEDC	260
IN Family and Social Services Administration	FSSA	405, 410, 497, 498, 500, 501, 503
IN Governor's Council for People with Disabilities	GCPD	035
IN Governor's Workforce Council	GWC	512
IN Indiana Disability Rights	IDR	044
IN Integrated Public Safety Commission	IPSC	286

State of Indiana Agency Naming Conventions	Acronym	Business Unit (BU)
IN Law Enforcement Training Board	LETB	103
IN Lieutenant Governor's Office	LG	038
IN Management Performance Hub	MPH	060
IN Office of Community & Rural Affairs	OCRA	038
IN Office of Energy Development	OED	266
IN Office of Management and Budget	OMB	055
IN Professional Licensing Agency	PLA	250
IN Prosecuting Attorneys Council	PAC	039
IN Protection and Advocacy Services Commission	PASC	044
IN Public Defender Council	PDC	610
IN School for the Blind and Visually Impaired	SBVI	550
IN School for the Deaf	SD	560
IN Secretary of State	SOS	040
IN State Budget Agency	SBA	057
IN State Library	ISL	730
IN State Police	ISP	100
IN Supreme Court	OJA	022
IN Utility Regulatory Commission	IURC	200
IN Veterans' Home	VH	570

Appendix I – Updates to User Guide

June 30, 2025

- All references to “eCivis” updated to “Euna”
- [Section 6 – Submit State Match Fund Request](#) *modified*
 - State Match Org Funding is added to the relevant Federal project.

August 12, 2024

- [Section 3 – Automatically Assigned Tasks \(Funding Source\)](#) *Task Descriptions updated*
- [Section 7 – Create Substate Transfer Org Funding](#) *modified*
- [Section 8 – Program Income and Rebate Organization Funding](#) *added*
- [Definitions](#) *moved prior to Appendixes*
- [Appendix F – Estimated Funding Source Guidance](#) *added*

May 1, 2024

- [Section 7 – Create Substate Transfer Org Funding](#) *modified*
- [Section 8 – Program Income and Rebate Organization Funding](#) *added*

January 24, 2024

- [Section 4 - Automatically Assigned Tasks \(Funding Source & Allot Ctrl\)](#) *title modified*

October 20, 2023

- [Section 4 – Automatically Assigned Tasks](#) *modified*
- [Section 6 – Submit State Match Fund Request](#) *added*
- [Section 7 – Create Substate Transfer Org Funding](#) *added*