eCivis User Guide: Subrecipient Manual

User Guide

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Setting up your account

After an award has been made, if this is your first time receiving an award you will receive an invitation from eCivis to setup your account. If you have already set up an account previously after receiving an award, you do not need to setup a new account.
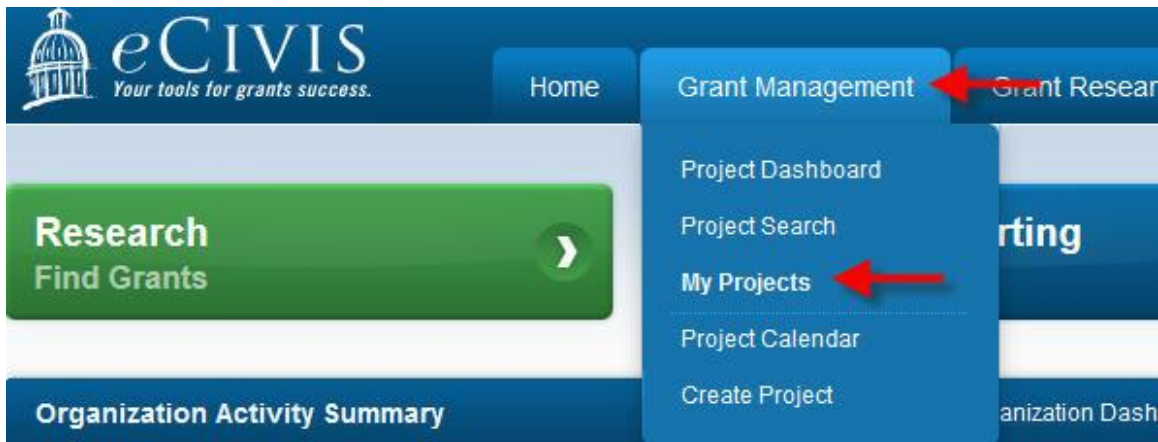
Example of account setup email:
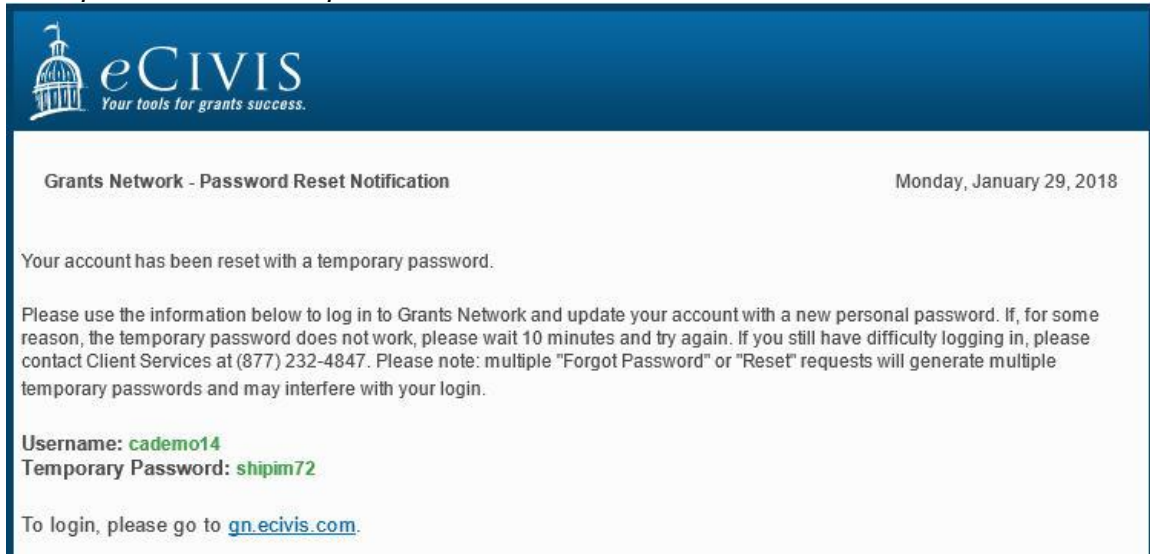
Follow the instructions in the email to complete your account setup.

My Projects

To see all of the projects/grant awards you have currently been awarded go to the *Grants Management* tab and select *My Projects*.

On the *My Projects* page you will see all the projects you are currently assigned to. To access a Project/Grant Dashboard click on the project title.
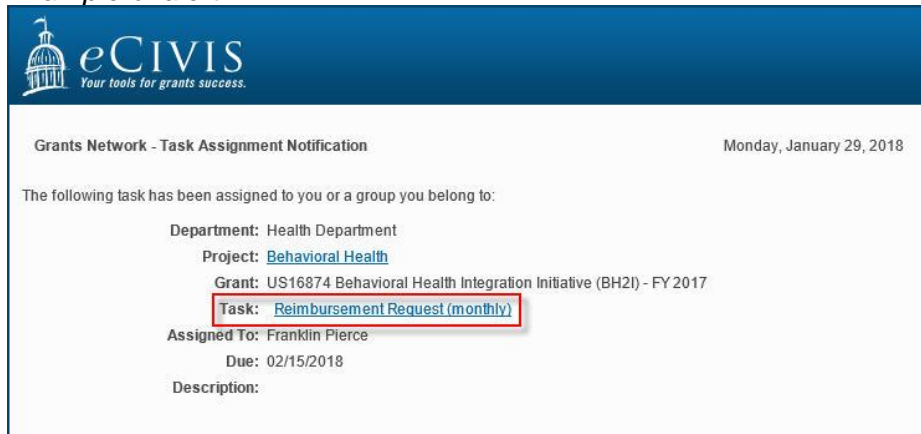

Completing an approval task

Once the funding agency has established the ongoing reports that will be required, alerts will be emailed when tasks are assigned to you. The email will include the project, grant, and task type that has been assigned to you.

Example of alert:

Make sure to read the description for instructions on any additional documentation that needs to be uploaded and submitted with the task.

To complete the task, select the task name from the email and you will be taken to the *Approval Request Form* page where you can upload any required documents and complete the task.

On the *Approval Request Form,* upload all required documents, set the Approval due date for 2 weeks from the present day, add any clarifying notes to the approver, and select *Save.*

Example of *Approval Request Form*

Once the request has been approved, you will automatically be notified of the decision. If approved, the task will be removed from the *Pending Tasks* tab to *Completed tasks*. You can check the *Completed Tasks* tab to review the task or confirm it has been completed.

Pending/Completed tasks tabs:

Completed Tasks tab:

FAQ

What if I missed or deleted the task assignment email? How do I find it again?

To find any pending tasks that may still be assinged to you, log into eCivis and go to the my project page.
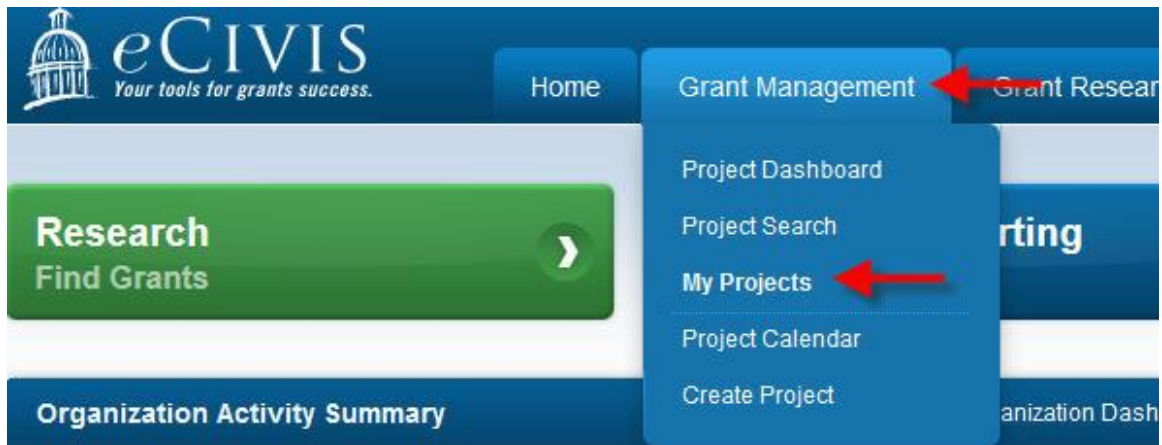
At the top of the page click on *Project Calendar*.

On this page you can see in a calendar view any upcoming tasks. You can also click on the *Display as List* option on the right side of the page to see a chronological listing of all tasks assigned to you, their status, due date, and a link to the task.

Project Calendar

Displayed as a list