Section 4.5: Organization Tag in eCivis

PURPOSE AND POLICY

Pursuant to the State of Arizona Accounting Manual (SAAM), Topic 70 Grants, Section 05 eCivis and AFIS, which states that grants <u>shall</u> be established in eCivis, the Office of Grants and Federal Resources (GFR) issues the following enhanced, best practices eCivis guidance and usage requirement related to the eCivis functionality of assigning Organization Tags for identifying and grouping like funding opportunities for reporting purposes. In addition to the required tags, agency-specific Organization Tags can be created, if needed; please contact staff at GFR@azdoa.gov.

PROCEDURE

GFR has created the Organization Tags below that are to be used by every agency:

- **Agency Name:** all funding opportunities pursued and/or awarded
- **COVID19 Funding:** all new funding opportunities pursued and/or awarded related to COVID19
- **COVID19 Reallocated Funding:** awarded funds reallocated from their original projects and assigned to new COVID19 related projects.

The eCivis User Guide J Organization Tags includes screenshots to illustrate this process. To assign the above Organization Tags to projects, an eCivis user will use eCivis search functionality to find the desired funding opportunity. Once it has been identified, the eCivis user will:

1. Click on the "Save/Assign Grant" button.
2. Select whether to save the funding opportunity as one of the following:

   - "Assign grant to an existing project;"
   - "Assign grant to a new project;" or
   - "Save as unassigned."

3. Select the "Department" where the project is assigned, and select the "Project" to save this grant;
4. Select the appropriate answer, yes or no, to the following question:

   - "Is an application required for this grant?"

5. Select the "Grant Status:"

- "Under Consideration;"
- "Application Preparation;" or
- "Application Submitted."

6. Select the appropriate Grant Tag(s) under "All Organization Tags" to apply to the funding opportunity and click the arrow to add each Grant Tag to the "Selected Organization Tags" field.

- Again, at a minimum, an eCivis user will be selecting his/her **State Agency** listed. However, if appropriate, an eCivis user will select one of the following Grant Tags as well:
  - **COVID19 Funding** - all new grants pursued and/or awarded related to COVID19; or
  - **COVID19 Reallocated Funding** - awarded funds reallocated away from their original projects and to new COVID19 related projects.

7. Depending on the "Grant Status" selected, an eCivis user shall upload the agency's application.
8. Click "Save."