

eCivis User Guide

Award and Subrecipient Management Manual

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Making an Award

1. After you have completed the review/scoring process and have determined who receive an award, select the application to be awarded:

View: Submissions By Folder | profileLink | Search

Grouped by: Folder

Folder	profileLink	projectTitle	4. Scope of Work
Under Review	kyoung@ecivis.com	Workforce Development - ...	The County of Jay Health D... 12 Mo
Under Review	kyoung@ecivis.com	REGION 5 WORKFORCE DE...	1. Further work to more ful... 3 ya
Under Review	jdelarorsa@ecivis.com	Test on Kelly's Account	Test Test
Under Review	atorres@ecivis.com	Job Incubator	The grant will only fund a p... It will
Under Review	epistemehayes@gmail.com	Brewery School	Creating a brewery school t... 5 Mo
Under Review	jbrayer@cox.net	Youth Employment Educati...	Contract staff to teach clas... 24 we

2. Select the folder drop down and change Under Review to Awarded:

REGION 5 WORKFORCE DEVELOPME...

Profile: kyoung@ecivis.com

1. Application/Project Title: REGION 5 WORKFORCE DEVELOPMENT

Folder dropdown menu: Under Review, Denied, **Awarded**

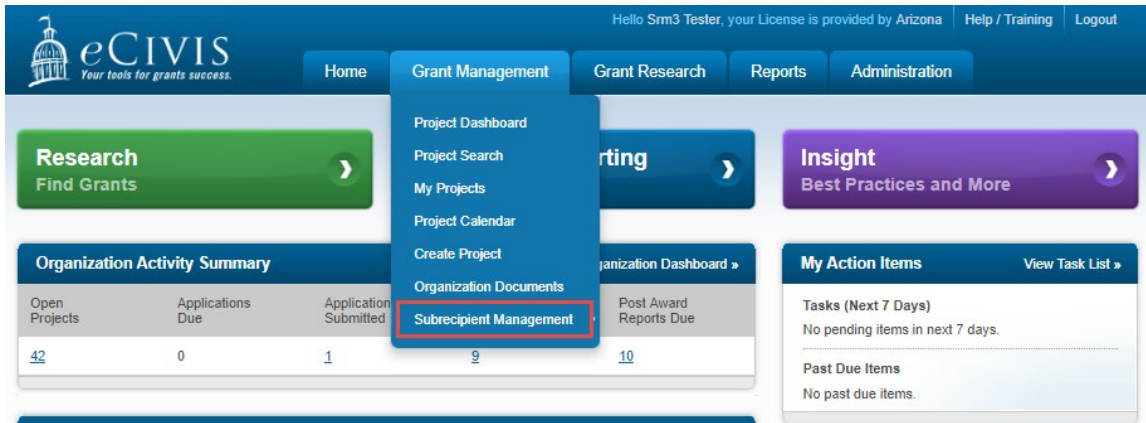
3. At the bottom left of this window, click *Save [Application name]*:

5. Project Timeline

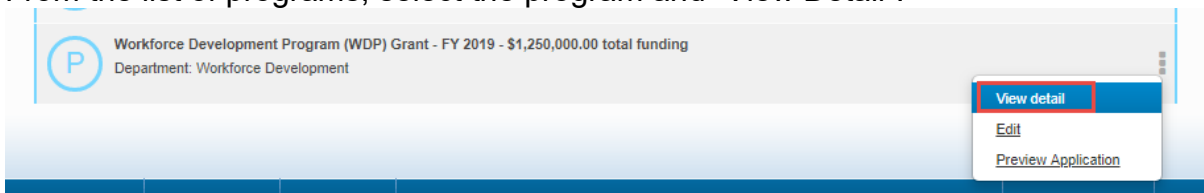
3 years - see attached

Save REGION 5 WORKFORCE... +

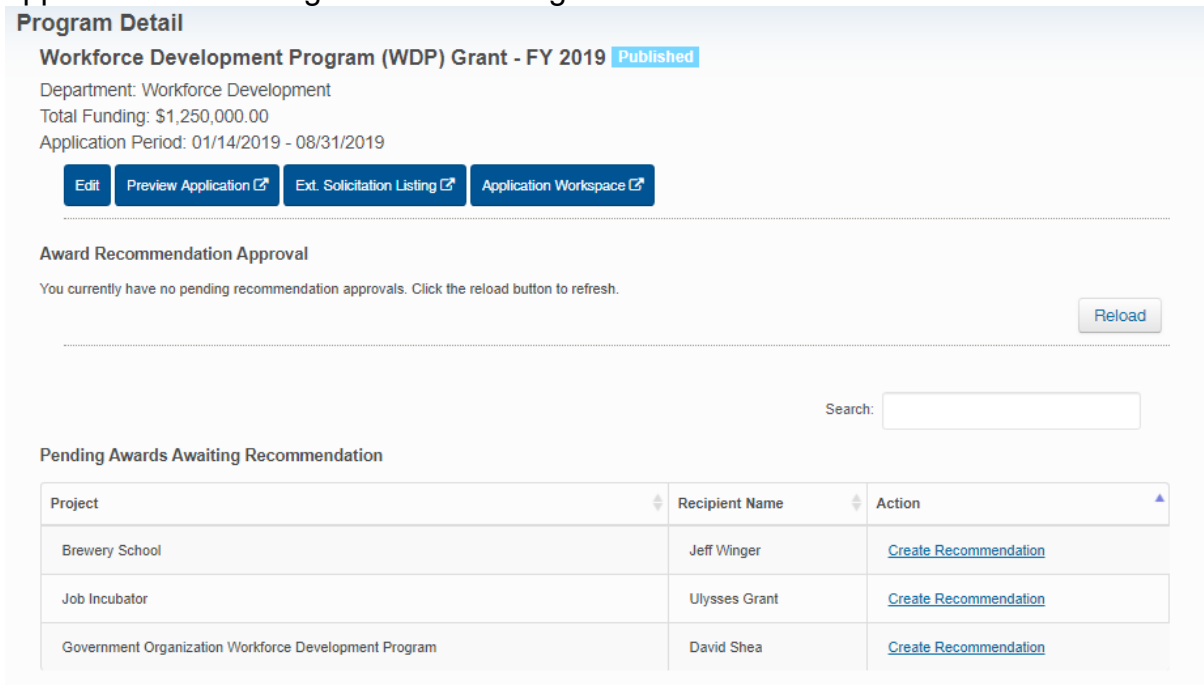
4. Log into Grants Network and from the Grant Management tab, select Subrecipient Management:



5. From the list of programs, select the program and “View Detail”:



6. The applicant that was moved into the Awarded folder in Zengine will now appear under Pending Awards Awaiting Recommendation:



7. From the row of the appropriate applicant, select “Create Recommendation”:

Search:

Pending Awards Awaiting Recommendation

Project	Recipient Name	Action
Brewery School	Jeff Winger	Create Recommendation
Job Incubator	Ulysses Grant	Create Recommendation
Government Organization Workforce Development Program	David Shea	Create Recommendation

8. Complete all available information on the following page:

Award Recommendation Approval Task Creation

Recipient: Ulysses Grant

Application: Job Incubator

External Note:*

Congratulations! We are pleased to inform you that your application has been accepted. We are still in the process of reviewing other potential recipients. We will send out further instructions for you once all subrecipients have been approved.

For any questions, please email support@organization.com.

698 characters remaining.

Internal Note:*

Application meets all requirements, exceeds the minimum score of 130 points, and was recommended by all reviewers. Please review for approval.

858 characters remaining.

EIN:

Award Number:

HXL-082019-001

9. Edit the Award Amount:

Allocate Funding:

	Total Funding	Funding Available	Subrecipient Award
General Fund FY19 - Workforce Development	\$ 1,250,000.00	\$ 1,210,000.00	\$ 40,000.00
Award Total			\$ 40,000.00

10. Once you have completed all fields, select *Send for Approval*:

File Name	Uploaded Date	File Size	Actions
No files have been uploaded			

Showing 0 to 0 of 0 entries

[Previous](#) [Next](#)

[Send for Approval](#)

[Cancel](#)

- Once the recommendation has been created, the applicant will have been moved on the Program Detail page from the Pending section to the Award Recommendation Approval section:

Program Detail

Workforce Development Program (WDP) Grant - FY 2019 Published

Department: Workforce Development
 Total Funding: \$1,250,000.00
 Application Period: 01/14/2019 - 08/31/2019

Edit Preview Application Ext. Solicitation Listing Application Workspace

Search:

Award Recommendation Approval

Project	Recipient Name	Award Approved	Links
Job Incubator	Ulysses Grant	\$40,000.00	<a>Award Package <a>Application

Showing 1 to 1 of 1 entries

Reload Approve Reject

Search:

Pending Awards Awaiting Recommendation

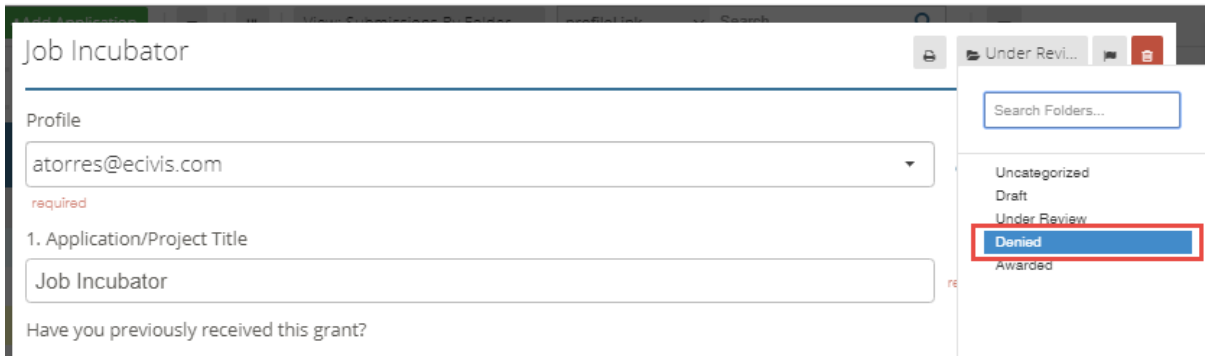
Project	Recipient Name	Action
---------	----------------	--------

Making a Denial

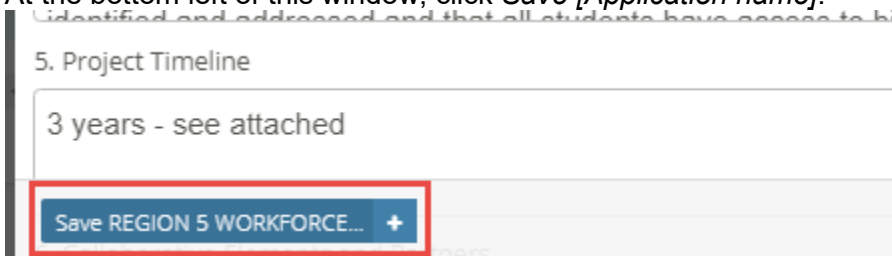
- After you have completed the review/scoring process and have determined who will *not* receive an award, select the application to be denied:

	Folder	profileLink	projectTitle	
▲	Under Review			
↶	Under Review	kyoung@ecivis.com	Workforce Development - ...	The Co
↶	Under Review	jdelarorsa@ecivis.com	Test on Kelly's Account	Test
↶	Under Review	atorres@ecivis.com	Job Incubator	The gra
↶	Under Review	epistemehayes@gmail.com	Brewery School	Creatin

2. Select the folder drop down and select *Denied*:



3. At the bottom left of this window, click *Save [Application name]*:



Viewing an Award

1. To view and manage subrecipients and their awards, log into Grants Network and in the Grant Management tab, select *Subrecipient Management*:

The screenshot shows the eCIVIS Grants Network dashboard. The top navigation bar includes 'Home', 'Grant Management', 'Grant Research', 'Insight', 'Reports', and 'Administration'. The 'Grant Management' menu is expanded, showing options like 'Project Dashboard', 'Project Search', 'My Projects', 'Project Calendar', 'Create Project', 'Organization Documents', and 'Subrecipient Management' (highlighted with a red box). The dashboard also features a 'Research' section with 'Find Grants', an 'Organization Activity Summary' table, a 'Department Activity Summary' table, and a 'My Action Items' section.

Open Projects	Applications Due	Applications Submitted	Funding Awarded	Post Award Reports Due
2076	27	116	1181	316

2. From the Program Dashboard, find your program and select *View Detail*:

The screenshot shows the Program Dashboard with a list of programs. The 'View detail' button for the 'Adult Day Care' program is highlighted with a red box. The dashboard includes a 'Click to filter' section with buttons for 'Draft', 'Under Review', 'Published', and 'Archived'. The list of programs includes:

- Adult Day Care - \$250,000.00 total funding
Department: Parks and Rec
- DEMO Wildlife Rehabilitation Grant - \$800,000.00 total funding
Department: CEO - Budget & Finance Division/Grants Division
- Fire Prevention Education Program - \$500,000.00 total funding
Department: Housing Authority
- Test-CDBGFY19 - \$500,000.00 total funding
Department: Workforce Development

3. At the bottom of the Program Detail page, you can view all your subrecipients:

The screenshot shows the Program Detail page with a 'Subrecipients' section. The 'Subrecipients' section lists the following subrecipient:

- Kelly Young
Workforce Development - Health Department
\$0.00

4. Select *View Detail* to view the subrecipients awards and most recent budget reports:

Subrecipients

Kelly Young
Workforce Development - Health Department
\$0.00

[View detail](#)

Managing a subrecipient

1. Find the subrecipient and select *View Detail*:

Subrecipients

Kelly Young
Community-based Day Care Unit for People with Dementia at HCC Proposal
\$44,444.00

[View detail](#)

2. The Subrecipient Detail page will provide a summary of the subrecipient's award, spending, and spending up to the latest financial report:

Subrecipient Detail

Subrecipient: Kelly Young
Project: Community-based Day Care Unit for People with Dementia at HCC Proposal
Approval Date: 00/13/2019
Approved Amount: \$44,444.00
Total Federal Award: \$0.00
Total Other Award: \$0.00
Total Match: \$0.00
Period of Performance: N/A - N/A

Program: Adult Day Care
Award Number: DC-18-0001
EIN: 000000000

[Back to Program Detail](#) [Add Payment](#) [View/Edit Budget](#) [Closeout](#) [Subrecipient Monitoring](#)

	Spend	Match	Spend + Match	% Match
Total Approved	\$ 44,444.00	\$ 0.00	\$ 44,444.00	0 %
Total Spend	\$ 0.00	\$ 0.00	\$ 0.00	0 %
Total Remaining	\$ 44,444.00	\$ 0.00	\$ 44,444.00	0 %
Total Disbursement	\$ 0.00			
Payment Balance	\$ 0.00			

Completing an approval task

1. If you have been assigned any task for any program, the task will appear on your Program Dashboard. From the Grant Management tab, select Subrecipient Management:

The screenshot shows the eCIVIS dashboard with the following elements:

- Header: eCIVIS logo, navigation tabs (Home, Grant Management, Grant Research, Reports, Administration).
- Left sidebar: Research (Find Grants), Organization Activity Summary (Open Projects: 86, Applications Due: 6, Application Submitted: 4).
- Center: Grant Management dropdown menu with options: Project Dashboard, Project Search, My Projects, Project Calendar, Create Project, Organization Documents, and **Subrecipient Management** (highlighted with a red box).
- Right sidebar: Insight (Best Practices and More), My Action Items (Tasks (Next 7 Days), Past Due Items).

2. Under Your Pending Approval Tasks, find the appropriate task and click on *Visit Program*. You can also search for the name of the program, or filter the columns to find the task:

The screenshot shows the 'Your Pending Approval Tasks' section with a search bar and a table of tasks. The table has columns: Program, Project, Recipient Name, Created Date, Task Type, and Action.

Program	Project	Recipient Name	Created Date	Task Type	Action
Workforce Development Program (WDP) Grant - FY 2019	Government Organization Workforce Development Program	David Shea	07/03/2019	Award Recommendation Approval	Visit Program
Workforce Development Program (WDP) Grant - FY 2019	Job Incubator	Ulysses Grant	07/08/2019	Award Response Approval	Visit Program

Showing 1 to 2 of 2 entries. Navigation: Previous 1 Next, Reload.

3. You will be taken to the Program Detail page and the task will appear in the Pending Approval Tasks section. From the Action column, select *Review Award*:

The screenshot shows the 'Pending Approval Tasks' section with a search bar and a table of tasks. The table has columns: Project, Recipient Name, Task Type, Submitted Date, and Action.


Project	Recipient Name	Task Type	Submitted Date	Action
Job Incubator	Ulysses Grant	Award Response Approval	07/08/2019	Review Award

Showing 1 to 1 of 1 entries. Navigation: Previous 1 Next, Reload.

You can view any notes from the subrecipient and download any files from the following page:

Award Files (from applicant):

Search:

File Name	File Size	Created On	Actions
Award Notice Place Holder.docx	11.0 Kb	07/08/2019	

Showing 1 to 1 of 1 entries


[Previous](#) **1** [Next](#)

[Approve](#) [Return to Applicant](#) [Decline](#)

4. Select *Approve* to complete your task. You can leave any notes or comments on the following window:

Award Files (from applicant):

Search:

File Name	File Size	Created On	Actions
Award Notice Place Holder.docx	11.0 Kb	07/08/2019	

Showing 1 to 1 of 1 entries

[Previous](#) **1** [Next](#)

[Approve](#) [Return to Applicant](#) [Decline](#)

5. If you have completed the Award Recommendation Approval task, the subrecipient will be moved from Pending Approval Task to the Subrecipient section:

Pending Approval Tasks

No approval tasks require your attention. Click the reload button to refresh.

[Reload](#)

Subrecipients

Ulysses Grant Job Incubator \$40,000.00	⋮
Kelly Young Workforce Development - Health Department \$0.00	⋮

- You can now select *View Detail* to see the subrecipients award and spending history:

Pending Approval Tasks

No approval tasks require your attention. Click the reload button to refresh.

[Reload](#)

Subrecipients

<p>Ulysses Grant Job Incubator \$40,000.00</p>	View detail
<p>Kelly Young Workforce Development - Health Department \$0.00</p>	

Reviewing a Financial Report

- If you have been assigned as part of the Financial Report Approval sequence, the task will appear on your Program Dashboard. From the Grant Management tab, select *Subrecipient Management*:

The screenshot shows the eCIVIS Grant Management interface. The top navigation bar includes Home, Grant Management, Grant Research, Insight, Reports, and Administration. The Grant Management dropdown menu is open, showing options: Project Dashboard, Project Search, My Projects, Project Calendar, Create Project, Organization Documents, and Subrecipient Management (highlighted with a red box). Below the navigation, there are several summary cards: Research (Find Grants), Organization Activity Summary (table with columns: Open Projects, Applications Due, Applications Submitted, Post Award Reports Due), Department Activity Summary (table with columns: Open Projects, Applications Due, Applications Submitted, Funding Awarded, Post Award Reports Due), My Action Items (Tasks (Next 7 Days), Past Due Items), and My Grant Activity.

- The Financial Report Approval task will appear on the Program Dashboard underneath Your Pending Approval Tasks. Select *Visit Program* next to the

appropriate subrecipient:

Search:

Your Pending Approval Tasks

Program	Project	Recipient Name	Created Date	Task Type	Action
Workforce Development Program (WDP) Grant - FY 2019	Government Organization Workforce Development Program	David Shea	07/03/2019	Award Recommendation Approval	Visit Program
Workforce Development Program (WDP) Grant - FY 2019	Job Incubator	Ulysses Grant	07/09/2019	Financial Report Approval	Visit Program

Showing 1 to 2 of 2 entries

[Previous](#) **1** [Next](#)

3. Under Pending Approval Tasks, select *Review Report*:

Search:

Pending Approval Tasks

Project	Recipient Name	Task Type	Submitted Date	Action
Job Incubator	Ulysses Grant	Financial Report Approval	07/09/2019	Review Report

Showing 1 to 1 of 1 entries

[Previous](#) **1** [Next](#)

[Reload](#)

4. Review the spending detail and adjust the amount to be reimbursed:

Amount Requested for Reimbursement:
\$750.00

Select accounts for payment:

	Available	Amount
General Fund FY19 - Workforce Development	\$ 1,250,000.00	\$ 0.00
Allocation Total		\$ 0.00

Financial Report Narrative:

5. If the subrecipient has attached files, you can download them from the **Review Report Files**:

Financial Report Files:

Search:

File Name	File Size	Created On	Actions
There are currently no files available.			

Showing 0 to 0 of 0 entries

[Previous](#) [Next](#)

6. At the bottom of the page, select to approve or deny the reimbursement:

File Name File Size C

There are currently no files available.

Showing 0 to 0 of 0 entries

Approve Reject

7. Detail the decision for approval and click on OK:

Are you sure you want to approve this financial report?

Enter a comment:

Reimbursement approved.

4977 characters remaining.

Ok Cancel

Viewing financial activity

1. To view a subrecipient's financial activity or history, select the program from the Program Dashboard and select *View Detail*:

WDA (DEMO) - \$12,000,000.00 total funding
Department: Workforce Development

Workforce Development (Demo Prep) - \$8,000,000.00 total funding
Department: Workforce Development

Workforce Development Program (WDP) Grant - FY 2019 - \$1,250,000.00 total funding
Department: Workforce Development

View detail
Edit
Preview Application

- Select the appropriate subrecipient and click on *View Detail*:

Subrecipients

Ulysses Grant Job Incubator \$40,000.00	View detail
Kelly Young Workforce Development - Health Department \$0.00	

- You can view the award summary:

[Add Payment](#)
[View/Edit Budget](#)
[Subrecipient Monitoring](#)

	Spend	Match	Spend + Match	% Match
Total Approved	\$ 40,000.00	\$ 10,000.00	\$ 50,000.00	25 %
Total Spend	\$ 0.00	\$ 0.00	\$ 0.00	0 %
Total Remaining	\$ 40,000.00	\$ 10,000.00	\$ 50,000.00	25 %
Total Disbursement	\$ 0.00			
Payment Balance	\$ 0.00			

- The Financial Activities section will hold each specific spending report. Find the appropriate spending report and select *View Payment Request* from the Actions column:

Financial Activities

Show entries

Search:

Financial Activity	Date Created	Current Status	Actions
Financial Report 06/01/2019 - 06/30/2019	07/09/2019	Approved / Awaiting Payment	View Payment Request

Showing 1 to 1 of 1 entries

[Previous](#)

[Next](#)

[Reload](#)

Compensating or reimbursing a subrecipient

- You can submit an Advanced Payment without a Financial Report. If a Financial Report was submitted and approved, skip to step X

2. From the Subrecipient Detail, select *Add Payment*:

Approval Date: 00/04/2019 EIN: 000000000
 Approved Amount: \$100,000.00 +
 Total Federal Award: \$0.00
 Total Other Award: \$0.00
 Total Match: \$0.00
 Period of Performance: N/A - N/A

Back to Program Detail
Add Payment
View/Edit Budget
Closeout
Subrecipient Monitoring

	Spend	Match	Spend + Match	% Match
Total Approved	\$ 100,000.00	\$ 0.00	\$ 100,000.00	0 %
Total Spend	\$ 0.00	\$ 0.00	\$ 0.00	0 %
Total Remaining	\$ 100,000.00	\$ 0.00	\$ 100,000.00	0 %
Total Disbursement				

3. Select if the payment is to be advanced or reimbursed:

- a. Allocation: enter the payment in the Amount column. The Available amount and total will automatically calculate according to this. Then, click *Save*:

Back to Subrecipient Detail

Financial Payment

Select Payment Type:
 Allocation / Advance
 Reimbursement

Select accounts:

	Available	Amount
Adult Daycare	\$ 249,975.00	\$ 25.00
Allocation Total		\$ 25.00

Save Payment
Cancel

- b. Reimbursement: Select the Financial Report to be reimbursed. Only approved Financial Reports will appear here. Then, select *Mark Paid*:

Period of Performance: 07/03/2019 - 07/03/2021

Financial Payment

Select Payment Type:
 Allocation / Advance
 Reimbursement

Select a financial report:
 Period 05/01/2019 - 05/31/2019
Period 05/01/2019 - 05/31/2019

Fund	Amount
Total approved for payment	\$

Mark Paid
Cancel

- The payments will be recorded in the Financial Activities section of the Subrecipient Detail:

Financial Activities

Show entries

Search:

Financial Activity	Date Created	Current Status	Actions
Financial Report 05/01/2019 - 05/31/2019	07/09/2019	Approved / Awaiting Payment	View Payment Request
Financial Report 06/01/2019 - 06/30/2019	07/09/2019	Approved / Paid	
Financial Report 07/01/2019 - 07/31/2019	07/09/2019	Pending Approval	
Allocation / Advance	07/09/2019	Paid	

Updating a budget

- Subrecipients cannot update or make changes to their budget; however, a program administrator can. From the Subrecipient Detail page, select *View/Edit* budget:

Approval Date: 00/04/2019 EIN: 000000000
 Approved Amount: \$100,000.00
 Total Federal Award: \$0.00
 Total Other Award: \$0.00
 Total Match: \$0.00
 Period of Performance: N/A - N/A

	Spend	Match	Spend + Match	% Match
Total Approved	\$ 100,000.00	\$ 0.00	\$ 100,000.00	0 %
Total Spend	\$ 0.00	\$ 0.00	\$ 0.00	0 %
Total Remaining	\$ 100,000.00	\$ 0.00	\$ 100,000.00	0 %
Total Disbursement	<input type="text" value="0.00"/>			

- You will be taken to the Applicant’s budget in Portal. Click on the lock icon to unlock the page and to make amendments to the award amount:

Application Budget for Kelly Young
 Program: AZ911 FY20 Grant-TEST 2




Budget Settings

Multi-Term Budget: No Yes

Indirect Costs: Not Applicable, 0.00 %

Match / Cost Share: Not Applicable, 0.00 % \$ 0.00

Budget Stage: Awarded

Actions:   

Budget Summary

\$0.00 Total Direct Costs

\$0.00 Total Indirect Costs

\$0.00 Total Amount (Direct + Indirect)

\$0.00 Match / Cost Share

\$0.00 Program Income

- Click on the title to expand the line items for each category. Edit the line items by clicking on the cog wheels. You can also add new line items by clicking on *Add Row*. Changes will automatically be calculated in the Budget Items summary and the Budget summary:

Budget Items

1. Personnel

	Ext Cost	Direct Cost	Ind Cost	Cost Share
Personnel Totals:	\$162,000.00	\$162,000.00	\$0.00	\$0.00

Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Item Type
FTE		2	\$27,000.00	\$54,000.00	\$54,000.00		Direct Cost
FTE (NEW)	4 new	4	\$27,000.00	\$108,000.00	\$108,000.00		Direct Cost

[Add Row](#)

- Back towards the top of the page, click on the disk icon to save the new budget amounts:






Budget Settings

Multi-Term Budget: No Yes

Indirect Costs: Not Applicable, 0.00 %

Match / Cost Share: Not Applicable, 0.00 % \$ 0.00

Budget Stage: Awarded

Actions:     

[Save Changes](#)

5. To approve the new budget, click on the check mark:

Budget Settings

Multi-Term Budget No Yes ▼

Indirect Costs Not Applicable ▼ 0.00 %

Match / Cost Share Not Applicable ▼ 0.00 % \$ 0.00

Budget Stage: Awarded

Actions 