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 will receive an award, select the application to be awarded:

	∔ Ad	ld App	lication T III View:	Submissions By Folder 👻 profil	eLink v Search	Q	
	Gr	oupe	d by: Folder X				
			▲ Folder	profileLink	projectTitle	4. Scope of Work	
	4	Unde	r Review				
		۲	Under Review	kyoung@ecivis.com 🧷	Workforce Development	The County of Jay Health D	12 M
		۲	Under Review	kyoung@ecivis.com 🥜	REGION 5 WORKFORCE DE	1. Further work to more ful	3 yea
ľ		۲	Under Review	jdelarorsa@ecivis.com 🥏	Test on Kelly's Account	Test	Test
		٠	Under Review	atorres@ecivis.com 🧷	Job Incubator	The grant will only fund a p	It will
		۲	Under Review	epistemehayes@gmail.com	Brewery School	Creating a brewery school t	5 Moi
		٠	Under Review	jbrayer@cox.net 🥏	Youth Employment Educati	Contract staff to teach clas	24 we

2. Select the folder drop down and select Awarded:

REGION 5 WORKFORCE DEVELOPME	÷	🖕 Under Revi 📁 💼
Profile		Search Folders
kyoung@ecivis.com	•	Uncategorized
required		Draft
1. Application/Project Title		Under Review Denied
REGION 5 WORKFORCE DEVELOPMENT	r	Awarded
t the better left of this window, click Save (Application name)		

At the bottom left of this window, click Save [Application name]:
I videntified and addressed and that all students have assess to bit



4. From the right column, select the + icon next to Awards:



- 5. On the award form, complete the following fields:
 - Submission: Select the application you want to award
 - External note: enter a note for the awarded applicant.
 - Internal note: text for internal purposes only
 - Project type: select Construction or Non-Construction
 - Internal Project ID (optional): Internal field used to identify the project
 - Internal Project Name (optional): Internal field used to name the project
 - Internal Grant ID (optional): Internal field used to identify the grant
 - Internal Grant ID (optional): Internal field used to name the grant award
 - Approval Amount: amount of funding approved
 - Match Type: Enter Yes, No, or Recommended
 - Cash and/or In-kind amounts (if applicable): amount of Cash and/or In-Kind amount(s)
 - Contract Start Date (if applicable): enter the first day of the performance period
 - Contract End Date (if applicable): enter the last day of the performance period
 - DUNS (if applicable): enter a DUNS number
 - Notes (optional): enter any additional notes
- 6. After all applicable fields have been updated, select *Save New Award* at the bottom of the form.

Notes



7. After saving the new award, click back on the top left corner until you are taken back to the Applications tab. Awarded applications will be listed in the

Awards tab:

+Add Award T	View: Main - Award by Yea	submission	Link v Search	Q	Ø
		C)rag a column hea	ader here and drop it t	to group by that co

Making a Denial

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

		▲ Folder	profileLink	projectTitle	4
4	Unde	r Review			
	•	Under Review	kyoung@ecivis.com 🧷	Workforce Development	The Co
	•	Under Review	jdelarorsa@ecivis.com 🥜	Test on Kelly's Account	Test
	۰	Under Review	atorres@ecivis.com 🥏	Job Incubator	The gra
	٠	Under Review	epistemehayes@gmail.com	Brewery School	Creatin

2. Select the folder drop down and select Denied:

Job Incubator	e	🖕 Under Revi 🍺 😭
Profile		Search Folders
atorres@ecivis.com •		Uncategorized
required		Draft Under Review
1. Application/Project Title		Denied
Job Incubator	re	Awarded
Have you previously received this grant?		

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



4. From the right column, select the + icon next to Denials:

onu			
ired	Awards	0 + ^	ß
be, nth		There are no linked records on this form	ø
eek	Denials	• + •	9
ity		Add New Denial There are no linked records on this form	+
	Budget	0 + ^	
0			

- 5. On the Denial form, complete the External Message for the applicant
- 6. After all applicable fields have been updated, select *Save New Denial* at the bottom of the form. Then, click *Save and Return:*

Award Denial
Submission
Job Incubator 🔹
required Select the application for denial
The message you enter below will be sent directly to the applicant and appear in the eCivis Applicant Portal. If you need to update this message or retract a denial once you have clicked submit, please contact your eCivis Customer Service Representative, or support@ecivis.com.
External Message
This application is incomplete
G
Save and Return +

7. Click *Back* until you see the Applications tab:

[G Back
ļ	Job Incubator
ľ	Profile atorres@ecivis.com

8. All applications that are denied will appear in the Denials folder:

Forms we use 🔻	Applications	Reviews	Reviewers	Awards	4 More ▼	+
+Add Application	III View: S	ubmissions By Folder	✓ profileLink	✓ Search	Search Forms	
Grouped by: Folde					Denials	
► Fo	older	profileLink		projectTitle	Profile	
					Applicants	

Viewing an Award

1. To view and manage subrecipients and their awards, log into Grants Network and in the Administration tab, select Organization Programs.

Your tool	s for grants success.	Home	Grant Management	Grant Research	KnowledgeBase	Repo	rts Administration
Researc Find Grant	h s	->	Tracking & Re Manage Grants	porting	Knowled	dgel out G	My Account My Preferences Organization Preferences
							Organization Library
Organizatio	n Activity Summary		Viev	v Organization Dashboar	Self-Published	_	Organization Library Organization Programs
Organization Open Projects	n Activity Summary Applications Due	Applications Submitted	Viev Funding Awarded	v Organization Dashboar Post Award Reports Due	Self-Published Full Service with Committee		Organization Library Organization Programs Funding Sources Account Manager

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

rogram Dashi	Doard			
Add New Program	Public Solicitations Listing Page			
Click to filter:				
+ Draft	X Under Review	¥ Published	× Archived	
P Arizona 9 Department	-1-1 Grant Program-FY2020 - \$18,500,00 nt: ADA - Office of Grants and Federal Res	0.00 total funding ources		View detail
P Arizona C Department	i trus Research Council - FY19 - \$35,000 nt: AHA - Agricultural Consultation and Tra	.00 total funding ining		Edit Preview Application
P Arizona G Departmen	rain Research and Promotion Council - nt: AHA - Agricultural Consultation and Tra	FY19 - \$75,000.00 total fun ining	nding	Delete Archive
	sebera Lettuce Research Council - EV10	\$90,800,00 total funding		

3. Here, you can view all pending Financial reports and all your subrecipients:

lionation potan				
ublic Solicitations Listing Page				
Z911 FY20 Grant-TEST 2	Published			
Department: ADA - Office of Grant Fotal Funding: \$1,000,000.00 Application Period: 10/16/2018 - 12	s and Federal Resources 2/14/2018			
Back to Program Listing Edit	Preview Application	Ext. Solicitation Listing	Application Workspace	Delete Archive
ending rinancial reports			Search:	
Recipient Name 🍦 Project	Submitted Date	Reported Spend / Match	Reimbursement	t 🍦 Action 🔶
No financial reports require your attention	on.			
Showing 0 to 0 of 0 entries				Previous Next
Subrecipients				
Kelly Young Test 1 \$100,000.00				

Managing a subrecipient

1. Find the subrecipient and select View Detail:

Subrecipients	
Kelly Young	
\$100,000.00	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:

ecipient Detail								
brecipient: Kelly Young oject: Test 1 proval Date: 00/04/201 proved Amount: \$100) 19 ,000.00	+				Program Award N EIN: 000	: AZ911 FY20 umber: DC-18 000000	Grant-TEST 2 -0001
Total Federal Award: \$ Total Other Award: \$0.0 tal Match: \$0.00 riod of Performance:N	0.00 00 I/A - N//	4						
Pack to Program	Dotail	Add Pave	nent	View/Edit B	Budget	Closeout	Subrecipie	nt Monitoring
Back to Program	Detail	/ dur dyn						Ĩ
Back to Program	Detail	Spend		Match		Spend + Match	% 1	Match
Total Approved	\$ 1	Spend 00,000.00	\$	Match 0.00	\$	Spend + Match 100,000.00	% M	Match %
Total Approved	S 1 S 0	Spend 00,000.00	\$ \$	Match 0.00 0.00	\$ \$	Spend + Match 100,000.00 0.00	% M	Match %
Total Approved Total Spend Total Remaining	\$ 1 \$ 0 \$ 1	Spend 00,000.00 1.00 00,000.00) (\$) (\$) (\$	Match 0.00 0.00 0.00	\$ \$ \$	Spend + Match 100,000.00 0.00 100,000.00	% M 0 0	Match %
Total Approved Total Spend Total Remaining Total Disbursement	S 1 S 0 S 1 S 0	Spend 00,000.00 .00 00,000.00) (\$) (\$) (\$	Match 0.00 0.00 0.00	\$ \$ \$	Spend + Match 100,000.00 0.00 100,000.00	% M 0 0 0	Aatch %

Compensating or Reimbursing a subrecipient

1.	From the Subrecip Approval Date: 00/04/20 Approved Amount: \$100 Total Federal Award: \$0 Total Other Award: \$0.0 Period of Performance:	0,000.00 0,000.00 00 WA - N/	Detail, s	elec	t Add Pay	/mer	ot: EIN: 000	000000		
	Back to Program	Detai	Add Payr	ment	View/Edit B	udget	Closeout	Subre	cipient Monitoring	
	Total Approved	e /	Spend	e	Match	e	Spend + Match		% Match	
	Total Spend	>	100,000.00		0.00		100,000.00		70	
	Total Spond	\$	0.00	\$	0.00	\$	0.00	0	%	
	Total Remaining	\$	100,000.00	\$	0.00	\$	100,000.00	0	%	
	Total Disbursement									

2. Select if the payment is to be advanced or reimbursed and 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		
	Available	Amount
ORG0030 FY20 911 Grant Program TEST 2	\$ 1,000,000.00	\$ 0.00
Allocation Total		\$ 0.00
Save Payment Cancel		

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Updating a budget

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

proval Date: 00/04/2 proved Amount: \$10 otal Federal Award: otal Other Award: \$1 al Match: \$0.00 iod of Performance	019 00,000.0 \$0.00 0.00 :N/A - N	+ 0(+				EIN: 000	000000	
								
Back to Program	n Deta	il Add Payı	ment	View/Edit B	udget	Closeout	Subrecipie	ent Monitoring
Back to Program	n Deta	il Add Payı	ment	View/Edit B	udget	Closeout Spend + Match	Subrecipie	ent Monitoring Match
Back to Program	n Deta	Add Pays Spend 100,000.00	ment	View/Edit B Match	udget	Closeout Spend + Match 100,000.00	Subrecipie % I	ent Monitoring Match
Back to Program	n Deta \$ \$	il Add Payr Spend 100,000.00 0.00	ment S	Match 0.00	udget S	Closeout Spend + Match 100,000.00 0.00	Subrecipie % 0	Match %

2. You will be taken to the Applicant's budget in Portal. Click on the lock icon to make amendments to the award amount:

Application Budge Program: AZ911 FY20 Grant-TE	et for Kelly You st 2	Ing						
		Budj	get Settings					Budget Summary
Multi-Term Budget	No Yes		٣				\$0.00	Total Direct Costs
Indirect Costs	Not Applicable		0.00			96	\$0.00	Total Indirect Costs
Match / Cost Share	Not Applicable	٣	0.00	%	\$ 0.00		\$0.00	Total Amount (Direct + Indirect)
Budget Stage:	Awarded						\$0.00	Match / Cost Share
Actions							\$0.00	Program Income

3. 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:

t Items	el								
	Personnel	Totals	<u>Ext C</u>	<u>Cost [</u>	Direct Cost		Ind Cost	<u>Cost Share</u>	_
			\$162,	000.00	\$162,000.00		\$0.00	\$0.00	
Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Item Type		
FIE (NEWS)		2	\$27,000.00	\$54,000.00	\$54,000.00		Direct Cost		
Add Row	+ 116.00	4	\$27,000.00	\$108,000.00	.⊅⊤v6,000.00		Direct Cost		

4. Click on the disk icon to save the new budget amounts:

Aulti-Term Budget	● No ◎ Yes		Ψ.			
Indirect Costs	Not Applicable	٣	0.00			%
/latch / Cost Share	Not Applicable	٠	0.00	%	\$ 0.00	
Budget Stage:	Awarded					
Actions		A	~			

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

		Budg	et Settings			
Multi-Term Budget	• No 🔍 Yes		•			
Indirect Costs	Not Applicable	٠	0.00			%
Match / Cost Share	Not Applicable	۲	0.00	%	\$ 0.00	
Budget Stage:	Awarded					
Actions		A	~			