

eCivis User Guide

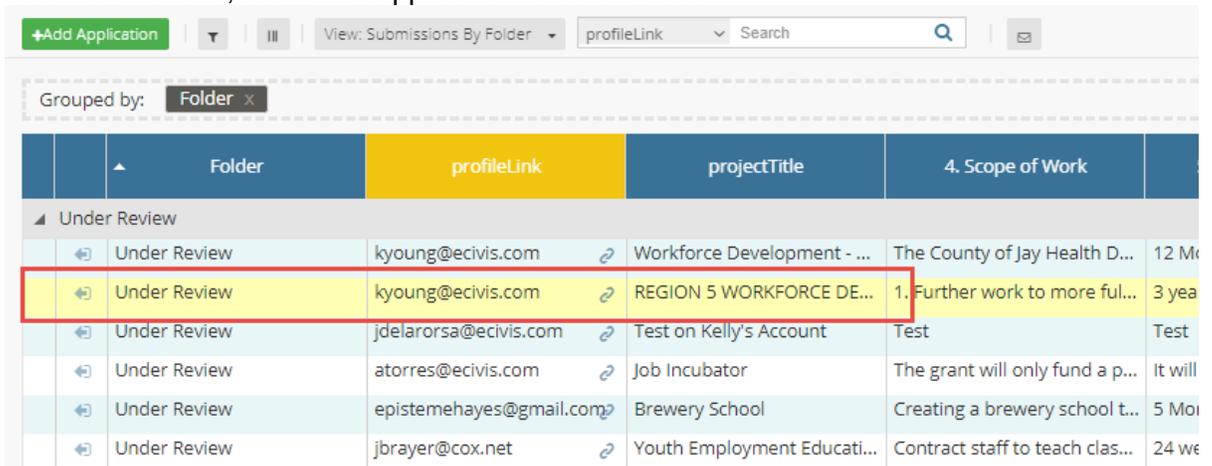
Award and Subrecipient Management Manual

Contents

Making an Award	2
Making a Denial	4
Viewing an Award	6
Managing a subrecipient.....	7
Compensating or Reimbursing a subrecipient	8
Updating a budget	9

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:



The screenshot shows a table of submissions. The table has columns for Folder, profileLink, projectTitle, and 4. Scope of Work. A red box highlights the row for 'REGION 5 WORKFORCE DE...'.

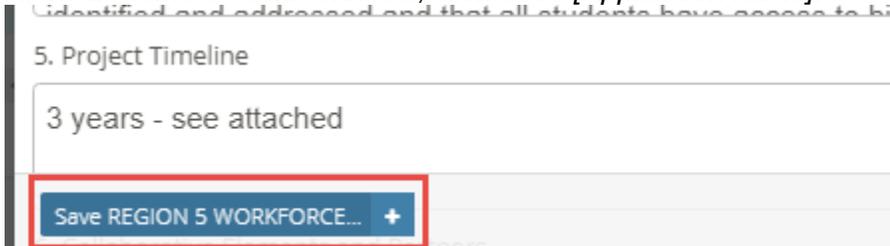
	Folder	profileLink	projectTitle	4. Scope of Work	
Under Review	Under Review	kyoung@ecivis.com	Workforce Development - ...	The County of Jay Health D...	12 Mo
Under Review	Under Review	kyoung@ecivis.com	REGION 5 WORKFORCE DE...	1. Further work to more ful...	3 yea
Under Review	Under Review	jdelarorsa@ecivis.com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

2. Select the folder drop down and select Awarded:



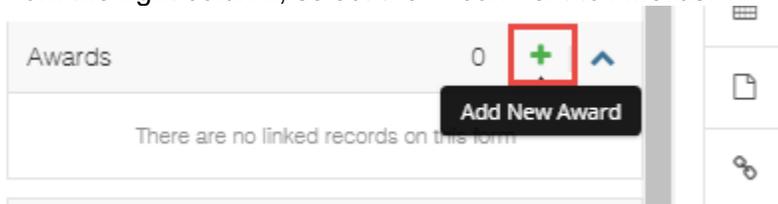
The screenshot shows the application details form. The 'Profile' dropdown is set to 'kyoung@ecivis.com'. The '1. Application/Project Title' field contains 'REGION 5 WORKFORCE DEVELOPMENT'. The folder dropdown on the right is open, and the 'Awarded' option is selected.

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



The screenshot shows the application details form. The '5. Project Timeline' field contains '3 years - see attached'. The 'Save REGION 5 WORKFORCE...' button is highlighted with a red box.

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

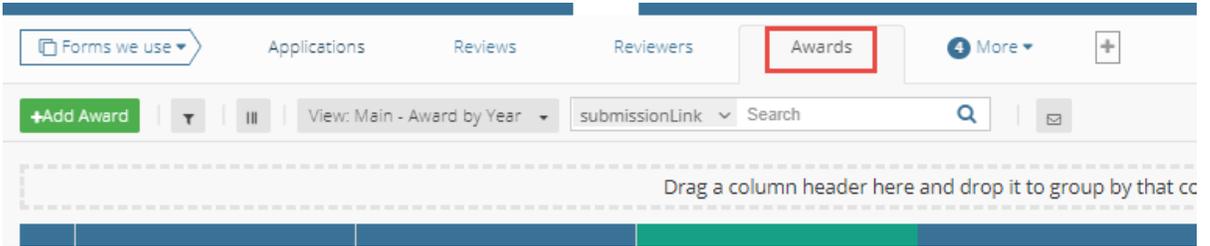
6. After all applicable fields have been updated, select *Save New Award* at the bottom of the form.

Notes

Save New Award +

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:



Making a Denial

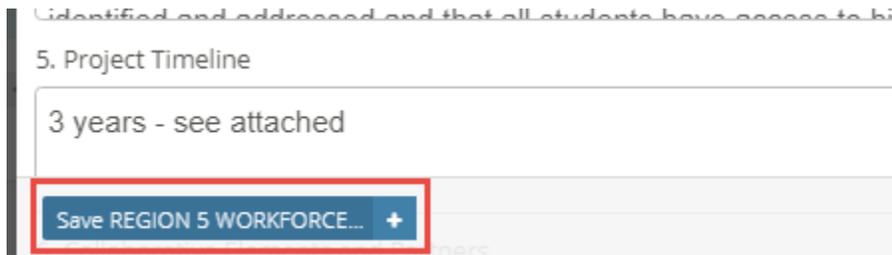
1. After you have completed the review/scoring process and have determined who will receive an award, select the application to be denied:

	Folder	profileLink	projectTitle	
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

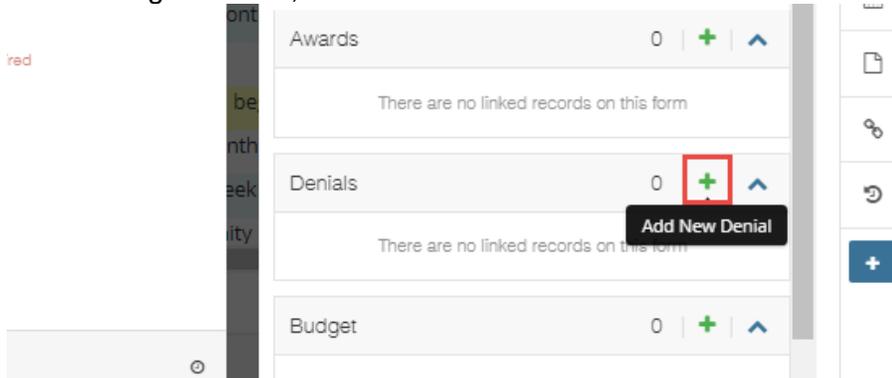
2. Select the folder drop down and select *Denied*:

The screenshot shows the 'Job Incubator' application form. The 'Profile' dropdown is set to 'atorres@ecivis.com'. The '1. Application/Project Title' field contains 'Job Incubator'. On the right side, a folder dropdown menu is open, showing options: 'Uncategorized', 'Draft', 'Under Review', 'Denied', and 'Awarded'. The 'Denied' option is highlighted with a red box.

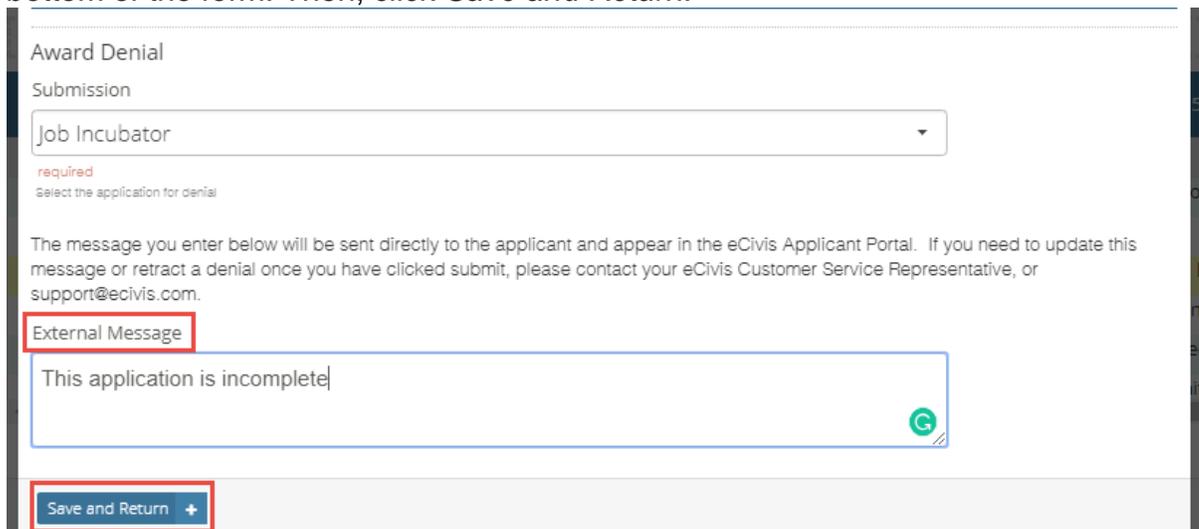
3. At the bottom left of this window, click *Save [Application name]*:



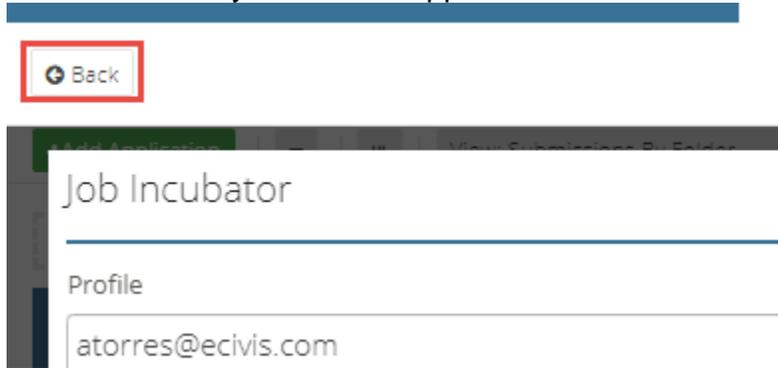
4. From the right column, select the + icon next to Denials:



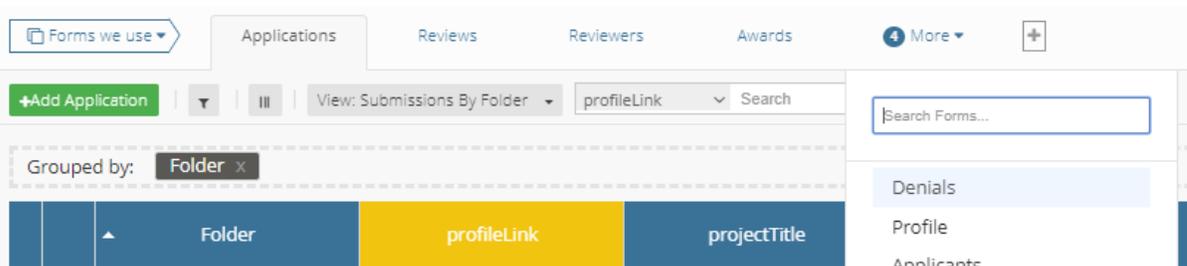
5. On the Denial form, complete the External Message for the applicant
6. After all applicable fields have been updated, select *Save New Denial* at the bottom of the form. Then, click *Save and Return*:



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

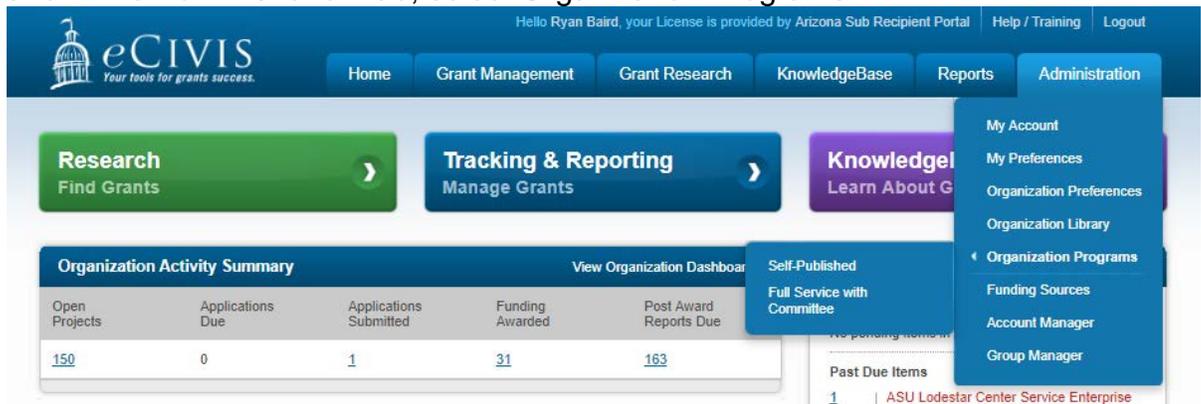


8. All applications that are denied will appear in the Denials folder:



Viewing an Award

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



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

Program Dashboard

Buttons: Add New Program, Public Solicitations Listing Page

Click to filter:

- + Draft
- * Under Review
- * Published
- * Archived

Programs listed:

- Arizona 9-1-1 Grant Program-FY2020 - \$18,500,000.00 total funding
Department: ADA - Office of Grants and Federal Resources
- Arizona Citrus Research Council - FY19 - \$35,000.00 total funding
Department: AHA - Agricultural Consultation and Training
- Arizona Grain Research and Promotion Council - FY19 - \$75,000.00 total funding
Department: AHA - Agricultural Consultation and Training
- Arizona Iceberg Lettuce Research Council - FY19 - \$90,800.00 total funding

Dropdown menu options:

- View detail
- Edit
- Preview Application
- Delete
- Archive

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

Solicitation Detail

Buttons: Public Solicitations Listing Page

AZ911 FY20 Grant-TEST 2 Published

Department: ADA - Office of Grants and Federal Resources
Total Funding: \$1,000,000.00
Application Period: 10/16/2018 - 12/14/2018

Buttons: Back to Program Listing, Edit, Preview Application, Ext. Solicitation Listing, Application Workspace, Delete, Archive

Pending Financial Reports

Search:

Recipient Name	Project	Submitted Date	Reported Spend / Match	Reimbursement	Action
No financial reports require your attention.					

Showing 0 to 0 of 0 entries

Buttons: Previous, Next

Subrecipients

Kelly Young Test 1 \$100,000.00

Managing a subrecipient

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

Subrecipients

Kelly Young Test 1 \$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:

Subrecipient Detail

Subrecipient: Kelly Young
 Project: Test 1
 Approval Date: 00/04/2019
 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

Program: AZ911 FY20 Grant-TEST 2
 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	\$ 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	\$ 0.00			
Payment Balance	\$ 0.00			

Compensating or Reimbursing a subrecipient

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

Approval Date: 00/04/2019
 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

EIN: 000000000

[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	\$ 0.00			

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

Select accounts:

	Available	Amount
ORG0030 FY20 911 Grant Program TEST 2	\$ 1,000,000.00	\$ 0.00
Allocation Total		\$ 0.00

[Save Payment](#)
[Cancel](#)

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:

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				

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

Budget Settings		Budget Summary	
Multi-Term Budget	<input checked="" type="radio"/> No <input type="radio"/> Yes	\$0.00	Total Direct Costs
Indirect Costs	Not Applicable 0.00 %	\$0.00	Total Indirect Costs
Match / Cost Share	Not Applicable 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:

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

4. 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     