

eCivis Grants Network

Creating a Public Solicitation

Contents

- [Step 1: Locate/Create a source of funds for the solicitation..... 2](#)
 - [STEP 1A: Competitive grant program – Locate a new source of funds 2](#)
 - [STEP 1B: Competitive grant program – Locate a previously saved source of funds 7](#)
 - [STEP 1C: Non-competitive grant program or non-grant funding – Create a new source of funding..... 9](#)
- [Step 2: Create the Approval Groups 9](#)
- [Step 3: Create the Public Solicitation..... 11](#)
- [Step 4: Create the Application Workspace 21](#)

Step 1: Locate/Create a source of funds for the solicitation

The purpose of this first step is to locate or create the **source** of funding for the solicitation and not the solicitation itself. For instance the source of funding could be a Federal grant where you are acting as the pass-through agency. Or it could be General Fund dollars from a special tax, etc.

NOTE: If the source of funds is a competitive Grant program and it has not been saved to a project, follow instructions 1A. If the source of funds is a competitive Grant program and it has already been saved to a project, follow instructions 1B. If the source of funds is a non-competitive grant program or non-grant funding, follow instruction 1C.

STEP 1A: Competitive grant program – Locate a new source of funds





- A. Select the *Research* button on the top left side of the home page and locate your grant using keywords or a CFDA number for Federal grants:

The screenshot shows the eCIVIS home page. At the top, there is a navigation bar with buttons for Home, Grant Management, Grant Research, and Know. Below this, there are two main buttons: a green 'Research Find Grants' button and a blue 'Tracking & Reporting Manage Grants' button. The 'Research Find Grants' button is highlighted with a red box. Below these buttons is an 'Organization Activity Summary' table with columns for Open Projects, Applications Due, Applications Submitted, Funding Awarded, and Post Award Reports Due. The values are 23, 0, 1, 13, and 27 respectively.

Open Projects	Applications Due	Applications Submitted	Funding Awarded	Post Award Reports Due
23	0	1	13	27

The screenshot shows the 'Search For Grants' section. It has two main search options: 'Search by Keyword' and 'Search Agent'. The 'Search by Keyword' option has a text input field and a search icon, both highlighted with a red box. The 'Search Agent' option has a dropdown menu for 'Existing Search Agents'. Below these options is an 'AND / OR' section and an 'Additional Search Criteria' section with an 'Open' button. At the bottom, there is a 'Find Grants Now!' button, also highlighted with a red box.

B. Click on the Floppy Disk icon to save the grant to a project:

Search Results						
Score	GN Code	Grant Title	Agency	Actual Funds	Due Date	
100.00	OR0228	Manufactured Dwelling Parks - FY 2018	OR HCS	Unspecified	Rolling	
98.14	US6329	Federal Lands to Parks Program - FY 2019	US Interior	Unspecified	Unknown	
96.15	NC0047	Parks and Recreation Trust Fund.(PARTE) - FY 2019	NC Other	Unspecified	04/01/2019 (Multiple)	
96.12	SC0111	Parks and Recreation Development Fund	SC DPRT	Unspecified	Unknown	

C. Select *Assign grant to a new project*:

Save/Assign Grant

Grant: EDR0024 CDBG grant

Assign grant to an existing project
 Assign grant to a new project
 Save as unassigned

D. Complete the fields with asterisks:

Assign Grant to New Project x

1. Select Department & Project

Grant: ORG0022 Prop. 47

Department *:

Project *:

Project Lead *:

Project Type *: Non-Construction Construction

Internal Project ID:

Internal Project Name:

Project Summary *:

E. Select *No* and *Grant Awarded*:

2. Select Funding Status

Is an application required for this grant? *: Yes No

3. Select Grant Status

Grant Status *:

F. Complete the fields with asterisks:

Assign Grant to New Project

4. Complete Status Form


Projected Award \$ *:

Is award amount known? Yes No

Internal Grant ID:

Internal Grant Name:

Do you consider this a competitive grant? *: Yes No

Award Notification *: 

Awarded \$ *:

G. If there is a match required, enter the amounts:

Assign Grant to New Project

Match Required: Yes


Match Type*:


Cash Match \$*:


In-Kind Value*:

H. Complete the following fields as necessary:

Assign Grant to New Project

Contract Start Date: 

Contract Close Date: 

Reminder: 

Award Type: Advance Payment Reimbursement

DUNS Number:

Grantor Contract Number:

Notes:
500 Characters Left

I. Select Yes to make the award available as pass-through funding and type in the amount you will be distributing:

5. Allocation Option

Are awarded funds to be available for use as pass-through funding? * No Yes

Amount to earmark for pass-through funding *:


Are awarded funds to be available for Allocation to sub-projects? * No Yes

J. Click the Folders icon to attach a file associated to the grant (if needed):

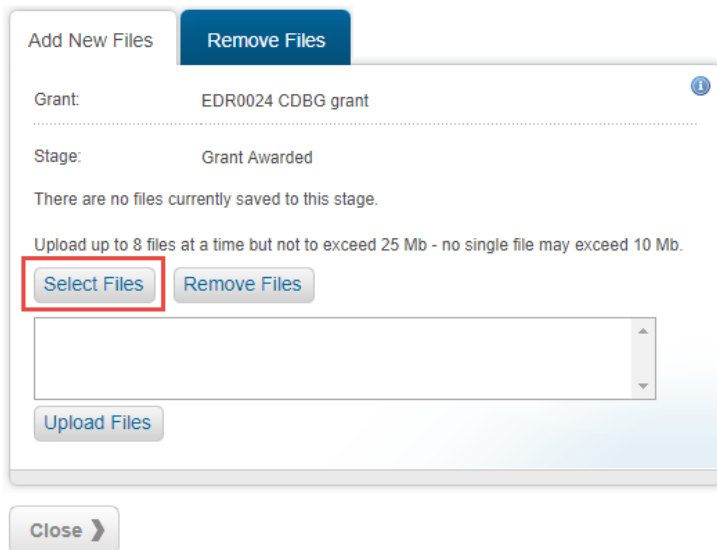
5. Allocation Options

Are awarded funds to be available for Allocation to sub-projects? * No Yes

Upload Files

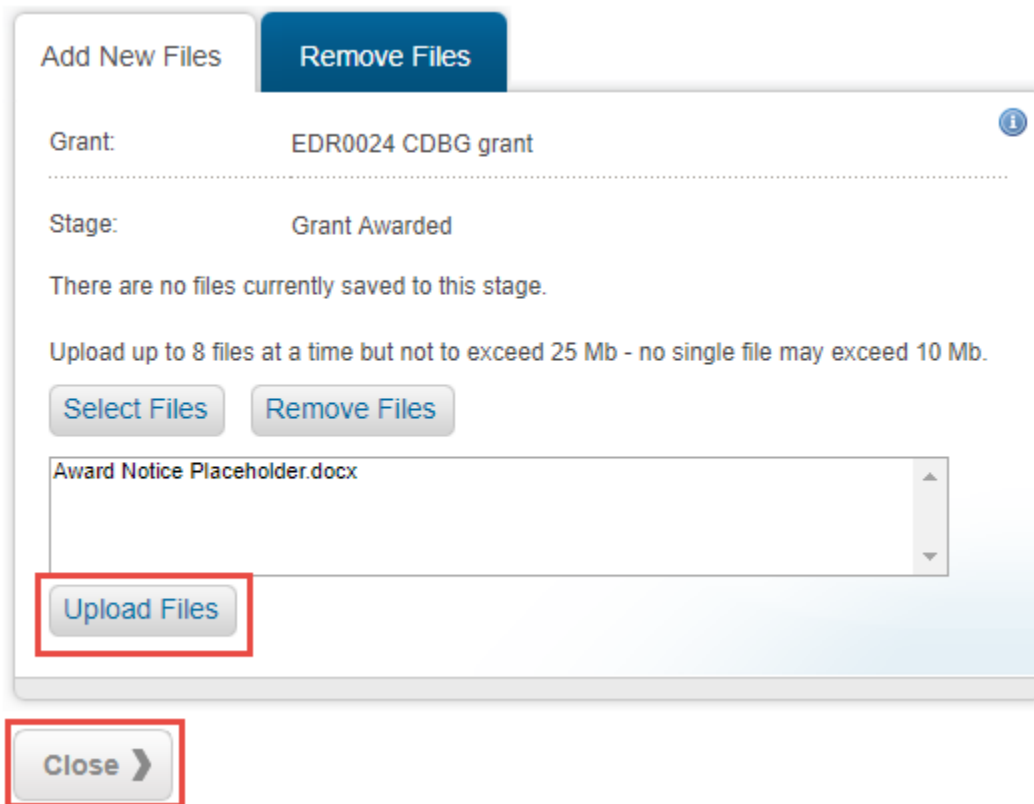
Attach Files: 

K. Click *Select Files* to upload any application files (not required):



The screenshot shows a file upload dialog box. At the top, there are two tabs: "Add New Files" and "Remove Files". Below the tabs, the "Grant" field is labeled "EDR0024 CDBG grant" and the "Stage" field is labeled "Grant Awarded". A message states, "There are no files currently saved to this stage." Below this, a note says, "Upload up to 8 files at a time but not to exceed 25 Mb - no single file may exceed 10 Mb." There are two buttons: "Select Files" (highlighted with a red box) and "Remove Files". Below these buttons is a file list area that is currently empty. At the bottom of the dialog is an "Upload Files" button. Below the dialog box is a "Close" button with a right-pointing arrow.


a. Find the file(s) to upload, click on *Upload Files*, and then *Close*:



The screenshot shows the same file upload dialog box as above, but now a file named "Award Notice Placeholder.docx" is listed in the file list area. The "Upload Files" button and the "Close" button (with a right-pointing arrow) are both highlighted with red boxes.

L. Click on Save:

Upload Files

Attach Files: 

Award Notice Placeholder.docx (10.9 Kb)


Save >

Cancel >

STEP 1B: Competitive grant program – Locate a previously saved source of funds

A. Click into Project Search under the Grant Management tab:

Hello Ryan Baird, your License is provided by Arizona | [Help / Training](#) | [Logout](#)



Home
Grant Management
Grant Research
Insight
Reports
Administration

Research

Find Grants >

Reporting

>

Insight

Best Practices and More >

Organization Activity Summary View Organization Dashboard >

Open Projects	Applications Due	Application Submitted	Organization Documents	Post Award Reports Due
2076	27	116	1181	316

Department Activity Summary View Department Dashboard >

Open Projects	Applications Due	Applications Submitted	Funding Awarded	Post Award Reports Due

My Action Items View Task List >

Tasks (Next 7 Days)
No pending items in next 7 days.

Past Due Items
No past due items.

My Grant Activity

Project Search

Project Dashboard

My Projects

Project Calendar

Create Project

Organization Documents

Subrecipient Management

- B. Search for your project or grant:

Project Search

Search for Project

See help popup for advanced search syntax. 

Search input: parks|



- PARD
 - SC0111 - Parks and Recreation Development Fund (PARD) - FY 2018
 - Dog Park Expansion
 - FD10644 - Animal Farm Foundation: Play Yard Construction Grants - FY 2018

- C. Click into the Grant Lifecycle tab:

Project Dashboard: PARD

Department: Workforce Development

Overview Documents **Grant Lifecycle** Goals & Metrics Budgets Contracts & Accounts

Active Grants  


SC0111: FY2018	Stage: Grant Awarded	Awarded: \$100,000.00 *	Match: \$2,000.00
SC0111 Parks and Recreation Development Fund (PARD) - FY 2018			

- D. Click on the *View/Edit* icon:

Grant Lifecycle Report

PARD

SC0111 Parks and Recreation Development Fund (PARD) - FY 2018

Stage	Completed On	Completed By	Files	View/Edit	Last Update
Grant Awarded	01/23/2019	K. Kapoor			

- E. Underneath *Allocation Option*, select *Yes* to allow funds to be used as pass-through funding and specify the amount that will be distributed in your program:

Allocation Option

Are awarded funds to be available for use as pass-through funding?*

No Yes

Amount to earmark for pass-through funding*:

65,000.00

Are awarded funds to be available for Allocation to sub-projects?*

No Yes

- F. Click *Save*.

STEP 1C: Non-competitive grant program or non-grant funding – Create a new source of funding

- A. If you are using a noncompetitive funding source, please submit the following information to Anna Haney (anna.haney@azdoa.gov) and Dean Johnson (dean.johnson@azdoa.gov) for approval.
- a. Requesting Agency
 - b. Primary Contact
 - c. Name for Funding Source
 - d. Amount
 - e. Short Description

Step 2: Create Approval Groups

You will need to provide approvers who will be involved at various stages of the award process:

1. Award Recommendation Approval: This task is before the recipient is notified of the award, to ensure that the award has been approved by the appropriate personal in your organization.
 2. First Award Approval: This task is triggered after the recipient is first notified and after they have completed the resubmission of information (if requested). This is the final approval by the Funding Agency.
 3. Grant Amendment Approval: This task will be activated if funding is allocated differently within the budget or performance period.
 4. Financial Report Approval: This task is triggered when the recipient wants to report their spending and receive their reimbursement.
- a. If you would like to assign more than one approver or a sequence of approvers for these tasks, you will need to create a group.

If you have already created your groups or will be assigning a single approver, you can skip ahead to **Step 3: Create the Public Solicitation**

- b. If you have permission for this feature, you can add approval groups by going to the Administration tab and clicking on *Group Manager*.

The screenshot shows the eCIVIS Administration menu. The 'Group Manager' option is highlighted with a red box. The menu items are: My Account, My Preferences, Organization Preferences, Organization Library, Funding Sources, Account Manager, and Group Manager.

- c. Click on *Add New Group* and enter information for the fields marked with an asterisk:

The screenshot shows the Group Manager page. The 'Add New Group' button is highlighted with a red box. The page title is 'Group Manager' and it includes a sub-header 'Active Groups'.

- d. Name the group with the title of the program. If you will be creating a different approval group for each task, include the name of the task. Add users to a new approval group:

The screenshot shows the Manage Group form. The 'Group Name' field contains 'Approval'. The 'Description' field contains 'All Public Safety applications to be approved in order before submission'. The 'Type' field has 'Sequential' selected. The 'Departments' list has 'Public Safety' selected. The 'Users' list has 'Katie Murphy (donotreply@ecivis.com)' and 'Kelly Young (kyoung@ecivis.com)' selected. The 'Selected Users' list has 'Eliza Bennett (donotreply@ecivis.com)' and 'Peter Quill (donotreply@ecivis.com)' selected. Red circles 1, 2, and 3 are placed above the 'Departments', 'Users', and 'Selected Users' lists respectively.

1. Select the department of the user
2. Move the user into the right column by clicking on their name, followed by the single right arrow. This will move the user into the right column under Selected Users.
 - i. To remove users, highlight their name in the rightmost column and click on the single left arrow
 - ii. You can move all names from each column using the double arrows.
3. If the group is sequential, use the up and down arrows to change the sequence of the approval. Sequential groups should be arranged from the first person to the last person.

4. Click Save.

The group will now appear as an option under User Group when creating your solicitation.

Step 3: Create the Public Solicitation

- A. To create a new solicitations, click on *Subrecipient Management* under the Grant Management tab:

The screenshot shows the eCIVIS dashboard with the following elements:

- Navigation Bar:** Home, Grant Management, Grant Research, Reports, Administration.
- Grant Management Dropdown Menu:** Project Dashboard, Project Search, My Projects, Project Calendar, Create Project, Organization Documents, **Subrecipient Management** (highlighted with a red box).
- Research:** Find Grants button.
- Insight:** Best Practices and More button.
- Organization Activity Summary Table:**

Open Projects	Applications Due	Application Submitted	Organization Dashboard	Post Award Reports Due
370	0	0	83	8
- My Action Items:** View Task List button. Tasks (Next 7 Days): No pending items in next 7 days. Past Due Items: No past due items.
- Department Activity Summary:** View Department Dashboard button.

- B. This will take you to the Program Dashboard. Here, click on *Add New Program*:

The screenshot shows the Program Dashboard with the following elements:

- Program Dashboard Header:** Add New Program (highlighted with a red box), Public Solicitations Listing Page.
- Search:** Search: [input field]
- Your Pending Approval Tasks:** Table with columns: Program, Project, Recipient Name, Created Date, Task Type, Action.

- C. Complete the information:

The screenshot shows the "Create New Program" form with the following fields and options:

- Please enter a name for your new program:** [input field]
- Please select a department:** -- Select Department -- [dropdown menu]
- Program Setup Tip:** The information provided here assists applicants who are seeking out funding assistance. This information will be visible publicly if the "Public" radio button is checked.
- Listing:**
 - Public
 - Private
- Buttons:** Create Program, Cancel

D. Click on *Edit*:

Home / Program Dashboard

Program Detail

Neighborhood Revitalization Published

Department: Health Services
 Total Funding: \$75,000.00
 Application Period: 05/01/2019 - 07/31/2019

[Back to Program Listing](#)
[Edit](#)
[Preview Application](#)
[Ext. Solicitation Listing](#)
[Application Workspace](#)

E. In the Solicitation Edit section, you must complete all the required fields and click **Save** before moving to the next tab. A green check mark will appear on any completed tabs. Tabs that are missing information will show a red X. Click on the tab you want to edit to enter information. The Solicitation can be edited at any time.

- a. Requests and questions about the program solicitation, review, and application forms can be left in the Review and Submission tabs. A Customer Success Representative will contact you about any requests or specifications for your program solicitation.

F. Overview: complete the Summary and any fields appropriate:

Overview ✓ | Eligibility 4 | Financial ✓ | Contact ✓ | Files ✓ | Review ✓ | Submission ✓ | Approval ✓

Step 1 of 8 * = Required for Section Completion

Title: 1

Application Start Date:

Application End Date:

ID:

CFDA:

Reference URL:

Listing Availability: Public Private

Summary: 2

Revitalize neighborhoods in your community

i Use the tabs to complete the solicitation. Make sure to click Save when making changes.

3 [Save](#) [Done](#)

G. Eligibility: check off at least one type of eligible applicant and leave any other eligibility criteria in the Eligibility Notes:

Overview ✓ Eligibility ✓ **Financial 4** Contact ✓ Files ✓ Review ✓ Submission ✓ Approval ✓

Step 2 of 8 * = Required for Section Completion

Eligible Applicants: * 1

- Local Government
- Academic Institutions
- Consortia
- Native American Tribe
- Non Profits
- Other
- Private Sector
- Schools/School Districts
- State Government

Eligibility Notes: *

2 Open to all local governments

1 Use the tabs to complete the solicitation. Make sure to click Save when making changes.

3 Save Done

H. Financial: Complete all required fields:

Overview ✓ Eligibility ✓ Financial ✓ **Contact 6** Files ✓ Review ✓ Submission ✓ Approval ✓

Step 3 of 8 * = Required for Section Completion

Total Funding \$75,000.00:*

- 0% US0002 Community Development Block Grant (CDBG) Program: Entitlement Communities (\$50,000.00)
- 0% HOME Funds (\$25,000.00)

Assign Default Payment Allocation Add Funding Source 4

Display the total funding amount on the external solicitation page:
 Yes No

Matching Required?:* 1

- Yes
- No
- Recommended

2 Matching Type: Cash

Award Amount: 1,000.00 (min) 10,000.00 (max)

Number of Awards: 10

Average Award Size: 10,000.00

Financial Notes: *

3 Please contact for more details

1 Use the tabs to complete the solicitation. Make sure to click Save when making changes.

5 Save Done

a. Add a funding source:

Overview ✓ Eligibility ✓ Financial ✓ Contact ✓ File

Total Funding \$75,000.00:*

0% US0002 Community Development Block Grant (CDBG) Program: Entitlement Communities (\$50,000.00)		
0% HOME Funds (\$25,000.00)		

Assign Default Payment Allocation **Add Funding Source**

Display the total funding amount on the external solicitation page:
 Yes No

b. Select Organizational Funding Source or Passthrough Funding and complete all required fields:

Add Funding Source x

Choose Funding Type:*

Please Select ▼

Please Select

Organizational Funding Source

Passthrough Funding

Close >

i. If your program will be distributing funds from a grant that has been saved to a project as in Step 1A or 1B, select Passthrough Funding. Total Allocation

refers to the amount to be distributed from the Total Available amount:

The screenshot shows a dialog box titled "Add Funding Source" with the following fields and values:

- Choose Funding Type.***: Passthrough Funding
- Select Department.***: Workforce Development
- Select Project.***: PARD
- Select Grant.***: SC0111 Parks and Recreation Development
- Total Available.***: \$65,000.00
- Total Allocation.***: \$60,000.00

Buttons at the bottom: "Save Funding" and "Close".

- ii. If you want to fund your program with a funding source that was submitted and approved from Step 1C, select Organizational Funding Source. Total Allocation refers to the amount to be distributed from the Total Available amount:

The screenshot shows a dialog box titled "Add Funding Source" with the following fields and values:

- Choose Funding Type.***: Organizational Funding
- Select Funding Source.***: General Fund FY19 - DEMO - Parks and Recreation C
- Total Available.***: \$750,000.00
- Total Allocation.***: \$697,000.00

Buttons at the bottom: "Save Funding" and "Close".

- c. To edit the amount available from each listed source of funding, click on the red pencil next to the appropriate listed source. To remove a source, click on the red trash icon.

Click on *Assign Default Payment Allocation*:

Overview ✓ Eligibility ✓ Financial ✓ Contact ✓ File

Total Funding \$75,000.00:*

0% US0002 Community Development Block Grant (CDBG) Program: Entitlement Communities (\$50,000.00)		
0% HOME Funds (\$25,000.00)		

Assign Default Payment Allocation Add Funding Source

Display the total funding amount on the external solicitation page:
 Yes No

- d. Enter a percentage for default payment from each program funding source and click **Save**:

Funding Source Default Payment Spread

Please enter a percentage for default payment from each program funding source. This information is used to default payment amounts from each fund on the payment screen when paying against a reimbursement request on a financial report.

<input type="text" value="0"/> %	US0002 Community Development Block Grant (CDBG) Program: Entitlement Communities (\$50,000.00) Federal
<input type="text" value="0"/> %	HOME Funds (\$25,000.00) Non-Federal

* Note - You do not have to default 100% of your program funding sources.

Save Cancel

- I. Complete Contact information.
- The Program Contact should be the person who will answer any application or program questions. If there is more than one method of contact, you may want to state the preferred method of contact.
 - If you are accepting mailed applications, you can list your organization address. If the application address and the program contact are the same, complete the program contact information and check the box underneath:

J. Files: provide a description of the documentation you are including and click on *Add File*:

a. Select the file and the File Label that best describes it. To delete an uploaded file, click on the red trash icon that appears in the Current Files box:

K. Review: add any notes about the reviewers:

- a. To add a reviewer, click on *Add Reviewer* and complete the form. Users can be deleted by clicking on the red trash icon in the Review Committee box:

- L. Submission: complete all required fields, marked with an asterisk. Leave any notes or questions about the program solicitation in the submission notes.
- The primary workspace email is the person who will be the point of contact for the application form and the program solicitation. This does not have to be the person listed on the Contact tab as the program staff.
 - If you select Yes to include a budget form in the application portal, select AZ-424A Simplified, SF-424A Non-construction, or SF-424C Construction from the drop down menu.

Approval 6

Step 7 of 8 * = Required for Section Completion

Primary Workspace Email:
The primary workspace email will receive an invitation to the administration workspace to manage the solicitation process. Additional emails may be added within the administration workspace.

ntunney@ecivis.com **1**

Budget Development:
Would you like your applicants to create a budget within the eCivis Portal? This will also be used to track spending during post award.

Yes No **2**

Note: Once a solicitation has been published, the budget template may not be changed.

SF-424A Non-Construction **3**

Track program income with Finance Reports
 Additive
 Subtractive
 Apply to match

Permit allowable 10% budget adjustment without award modification
 Send me notification when an allowable budget modification has been performed

Submission Notes:
Submission notes may be used to provide instructions to your customer service representative that will help them in designing the application and submission process for your solicitation. Once you have marked your solicitation complete, your customer service representative will follow up within one business day to confirm your program details. These notes will not appear to applicants.

4 Please let us know if you have any questions while provisioning the application!

5 [Save](#) [Done](#)

1 Use the tabs to complete the solicitation. Make sure to click Save when making changes.

M. Approval: This tab reflects the task flow that will be triggered for each award distributed.

Approval X

Step 8 of 8 * = Required for Section Completion

Please define an approval workflow for each of the tasks below*

Task Type	Workflow	1
Award Recommendation Approval	Standard	
Final Award Approval	Standard	
Grant Amendment Approval	Standard	
Financial Report Approval	Standard	

Award Files:
Award Files may be optionally added. These would include common program documents that the subrecipient needs to complete the award process. The files included here will be included in the award task. You will also be able to add subrecipient specific files when creating the award.

Award Files
No data available in table

2 [Add File](#)

3 [Save](#) [Done](#)

1 Use the tabs to complete the solicitation. Make sure to click Save when making changes.

e. Returning to the solicitation, to edit each Award Approval Task, click on each pencil.

1. Award Recommendation Approval: This task is before the recipient is notified of the award, to ensure that the award has been approved by the appropriate personal in your organization.
2. First Award Approval: This task is triggered after the recipient is first notified and after they have completed the resubmission of information (if requested). This is the final approval by the Funding Agency.
3. Grant Amendment Approval: This task will be activated if funding is allocated differently within the budget or performance period.
4. Financial Report Approval: This task is triggered when the recipient wants to report their spending and receive their reimbursement.
5. Award Files: Template files that are distributed to each recipient (standard agreement forms, requests for more information, etc.) can be uploaded here.

- f. A window will appear and you can select the approval type, followed by the designated approver:

- g. Approval Type:
1. Standard: the user, or any user from the user group, can complete the task.
 2. Sequential: the task will pass through a specific sequence of people to complete each step of the task.
- h. Designated for Approval:
1. User: select the department and appropriate person who will complete the task
 2. User group: Select the group of users that will be assigned the task. You must select "Sequential" if the task is to pass through each user in the group.
- i. Financial Reports Task only: if subrecipients will be submitting multiple financial reports, you can set the frequency of this task. This will automatically create and trigger the Financial Reports Task for approvers, instead of requiring manual assignment.
1. Select the user or user group assigned to the approval. They will be the same approvers for each recurrence.

2. Underneath the approver selection, define the frequency:
 - i. Frequency: how often the Financial Report Task will reoccur. This can be set to weekly or month intervals

- ii. Starting: the due date of the first report
 - iii. Create: When you would like the recurring task to be created and assigned.
 - iv. Until: the due date of the last report
- j. Click **Save**.

Step 4: Create the Application Workspace

- A. After clicking *Done*, you will be taken back to the Program Dashboard. Click on the three dots to the left of the program and select *Create App Workspace*:

Program Dashboard

Add New Program Public Solicitations Listing Page

Click to filter:

- Draft
- Under Review
- Published
- Archived

D	Test Case - \$53,000.00 total funding Department: Workforce Development	
U	COJ - Parks and Recreation Development Fund (PARF) - \$757,000.00 total funding Department: Workforce Development	<ul style="list-style-type: none"> View detail Edit Create App Workspace Delete
U	Continuum of Care Supportive Housing Program - \$1,464,723.00 total funding Department: Housing Authority	

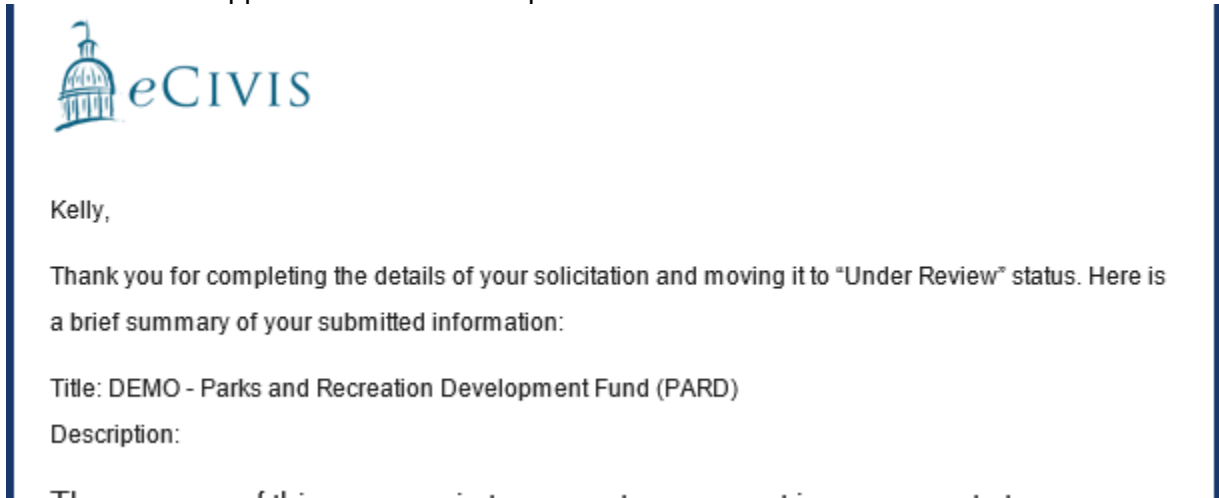
- a. Click **Yes** to confirm:

Attention!

Are you sure you want to create an application workspace for this program? Once this action has completed, the budget template may not be changed.

Yes No, Cancel

- B. The solicitation is Under Review. The Primary Workspace Owner will receive an email invitation to the applicant administration portal:



- C. Once the application and review process has been finalized, notify eCivis at support@ecivis.com that the solicitation is ready to be published. In the email, include:

Subject:

- Solicitation Ready to Publish

Body:

- Program Name
- Primary workspace owner
- Agency/Department
- Desired publish Date/Time