eCivis User Guide

Reviewer Admin Manual

Contents

Reviewer Portal URL

When you email support@ecivis.com to publish your grant program, you will be notified when it is available and also sent the link to access the reviewer portal.

Example: https://webportalapp.com/portal/applications_example

Once you have added your reviewers and assigned applications appropriately this link can be distributed to the reviewers to begin the review process.

Adding and Removing Reviewers

Reviewers can be added any time from Grant Network.

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

B. Select to edit the appropriate program:

C. Select the Review tab, then Add Reviewer:

Solicitation Edit

✖ = Incomplete   ✔ = Completed

| Overview ✔ | Eligibility ✔ | Financial ✔ | Contact ✔ | Files ✔ | Review ✔ | Submission ✔ |

Step 6 of 7   * = Required for Section Completion

Please enter review committee members:

Review Committee

David	Shea	dshea@ecivis.com	🗑
Anthony	Torres	atorres@ecivis.com	🗑
Kelly	Young	kyoung@ecivis.com	🗑

Add Reviewer ❯

Review 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.

| Source | 📋 📋 📋 | **B** *I* U | ≔ ≔ | ≔ ≔ | 🔗 🔗 |

Add Peter to the workspace. He will be editing the application after reviewing its appearance to applicants.

How is the review team notified when applications are submitted? They will be reviewing as they are submitted and not on a specific date.

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

Save ❯   Done ❯

a. Complete the form and select *Add Reviewer*:

Add Reviewer   ✖

First Name:*

Kelly

Last Name:*

Young

Email:*

kyoung@ecivis.com

Add Reviewer ❯   **Close ❯**

b. Users can be deleted by clicking on the red trash icon in the Review Committee box:

D. From the Review tab, select *Save*:

Reviewers added in Grants Network will automatically be imported into the Zengine Workspace.

Assigning Applications to Reviewers

1. To assign applications to reviewers, select the *Program Manager* flag icon at the top of the page and on the following page select *Edit Assignment*:
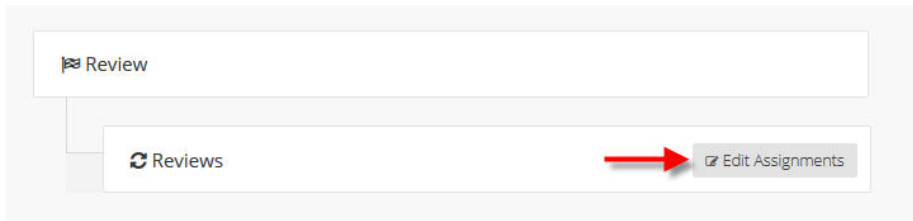
2. Assignments can be made by submission, group, or member. Select the method of assignment in the top left corner:
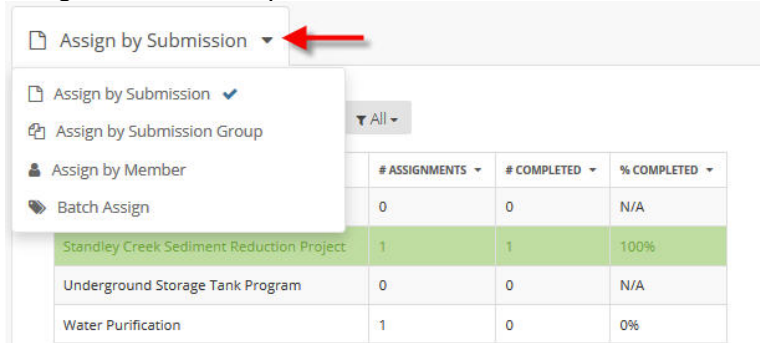
3. After selecting your assignment method, choose the submission, group, or member on the left side and the submission, group, or member it will be assigned to on the right:
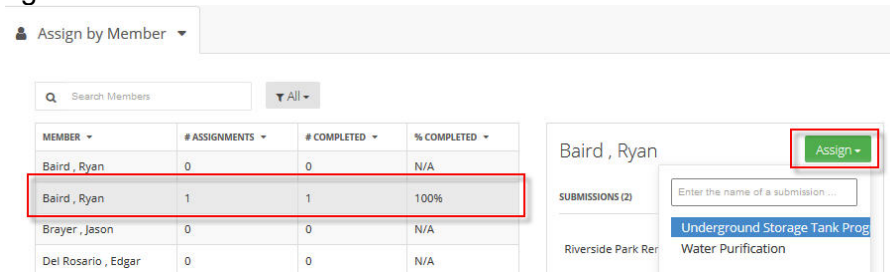
Reopening a review

1. To reopen a review that has already been submitted, go to the *Review* tab. Select the review you need to change:
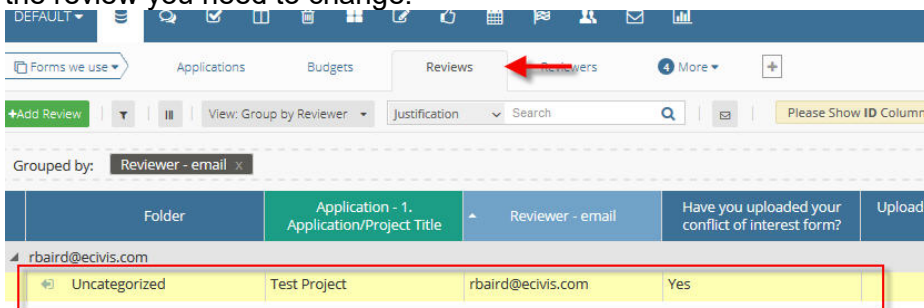
2. Next, on the top right hand side of the page select *Revert to Draft*:

Reviewing Feedback/Scores

There are two primary forms where you can begin reviewing each reviewer's application feedback and scores.

1. First, select the Review form. This form contains the feedback and category scoring submitted by the reviewer for each application they were assigned to review.

2. The default view is to group reviews by status (not started, in progress, or submitted). However, you can regroup by application and by reviewer. To change your view click on the *View* dropdown menu and select the desired view:

3. The applicant's total score can be seen in the Total Score column. Use the bar at the bottom to scroll left and right:

10. Program Specific Criteria #3 (Organization Capability)	Comments		Total Score	submissionLink	
8	no previous projects listed, ...	76		Mountain Club Hazardous	Hu
6	No previous project specifi...	79		Mountain Club Hazardous	Elli
7	The section does not refere...	82		Mountain Club Hazardous	St

4. The second form to review is the *Application* form. On the *Application* form each applicant's average score is included at the bottom of each record. Use the bar at the bottom to scroll left and right:

Letters	Average Score	# of Awards	# of Reviews	# of Denials	Total Awarded A
2018 WFHF Sprt Ltrs-OFD.p...	74.14	0	7	0	0.00
PNF Letter of Support.pdf	76.00	0	7	0	0.00
	69.86	0	7	0	0.00
Letters of support.pdf	77.86	0	7	0	0.00
	58.17	0	6	0	0.00
Letters of Support.pdf	78.00	0	7	0	0.00

Making an Award

*The subrecipient will not be notified of their award until the Award Recommendation Approval task has been completed. They will see their application as *Under Review* in their Portal.

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

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

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

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:

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 ⬀

Award Recommendation Approval

You currently have no pending recommendation approvals. Click the reload button to refresh.

Reload

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

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

8. Complete all available information on the following page:

   a. Note that the External Note will be viewable by the Subrecipient. The Internal note will be for Approver use only.

9. Edit the Award Recommendation Total, by identifying each distribution per funding source:

   a. To review or revise the applicant's budget select Award Budget.

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

11. 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	Award Package | Application	☐

Showing 1 to 1 of 1 entries

Reload   Approve   Reject

Search:

Pending Awards Awaiting Recommendation

| Project	Recipient Name	Action

Making a Denial

1. After you have completed the review/scoring process and have determined who will *not* be awarded, open the Denials form.

Forms we use ▾	Applications	Budgets	Reviews	Reviewers	❹ More ▾

+Add Application | ▼ | Ⅲ | View ▾ | profileLink ▾ | Search | 🔍

Search Forms...

Drag a column header here and drop it to group by that column.

profileLink	1. Application/Project Title	2. Program/Project Congressional District (check all that apply)
catherine.berger@helensh🔗		
contact@faithsolutions2me🔗.	Mental Health Ministry Vol...	8

Awards
Denials ←
Profile
Applicants

2. Select the *Add Denial* button on the top left side of the page to begin entering a denial.
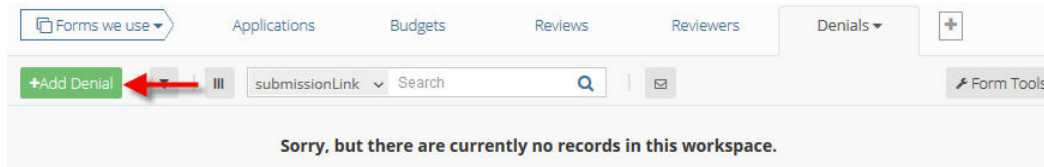
3. On the Denial form, complete the following fields:

   - Submission: Select the application you want to deny
   - External Message: Enter a message for the applicant

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

5. After saving the new denial, an email will be sent to the applicant notifying them of the denial including the External Message.