

# eCivis User Guide

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## Reviewer Admin Manual

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## Reviewer Portal URL

When you email [support@ecivis.com](mailto: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](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:

The screenshot shows the eCIVIS dashboard with the 'Grant Management' menu open. The menu items are: Project Dashboard, Project Search, My Projects, Project Calendar, Create Project, Organization Documents, and Subrecipient Management (highlighted with a red box). The dashboard also features sections for Research (Find Grants), Insight (Best Practices and More), Organization Activity Summary (with a table of Open Projects, Applications Due, Applications Submitted, and Post Award Reports Due), and My Action Items (Tasks and Past Due Items).

- B. Select to edit the appropriate program:

The screenshot shows the 'Programs' section with a filter for 'Under Review'. Three programs are listed:

Program Name	Total Funding	Department
Arizona 9-1-1 Grant Program-FY2020	\$18,500,000.00	ADA - Office of Grants and Federal Resources
Arizona Grain Research and Promotion Council - FY20	\$21,000.00	AHA - Agricultural Consultation and Training
Arizona Iceberg Lettuce Research Council - FY20	\$90,800.00	AHA - Agricultural Consultation and Training

For the first program, the 'Edit' button is highlighted with a red box. Other buttons visible are 'View detail' and 'Preview Application'.

## C. Select the Review tab, then Add Reviewer:

**Solicitation Edit**

✘ = Incomplete ✔ = Completed

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

Please enter review committee members:

Review Committee

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

**Add Reviewer** ➤

**Step 6 of 7** \* = Required for Section Completion

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:

Please enter review committee members:

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

[Add Reviewer >](#)

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




**Solicitation Edit**

✖ = Incomplete ✔ = Completed

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

Step 6 of 7 \* = Required for Section Completion

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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 >](#)

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

## Assigning Applications to Reviewers

- 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*:

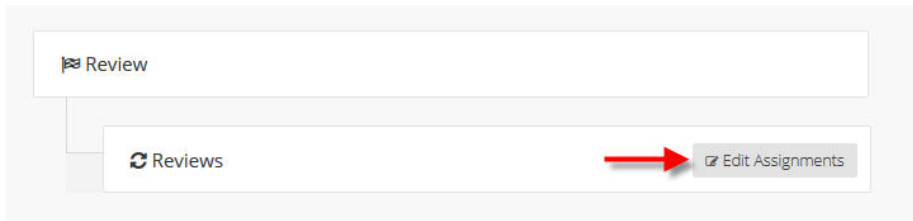
Environmental Restoration Program

Forms we use Applications Profile Applicants Reviewers **Program Manager**

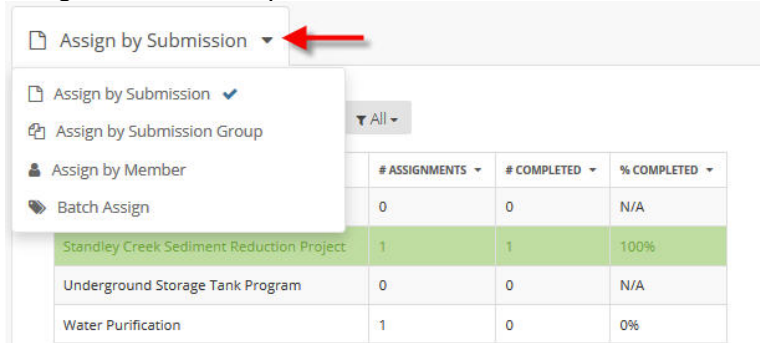
+Add Application profileLink Search

Drag a

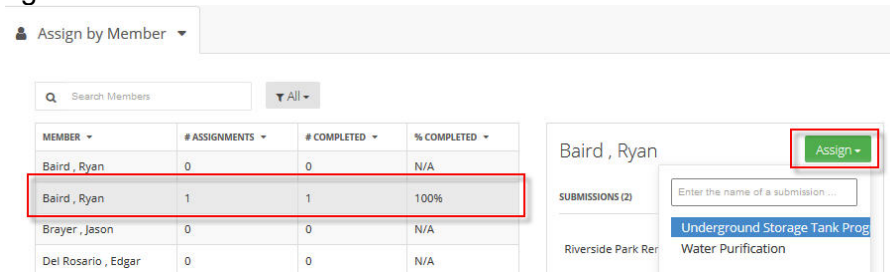
profileLink	Application/Project Title	Project Goals and Objectives	Scope of Work
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2. Assignments can be made by submission, group, or member. Select the method of assignment in the top left corner:

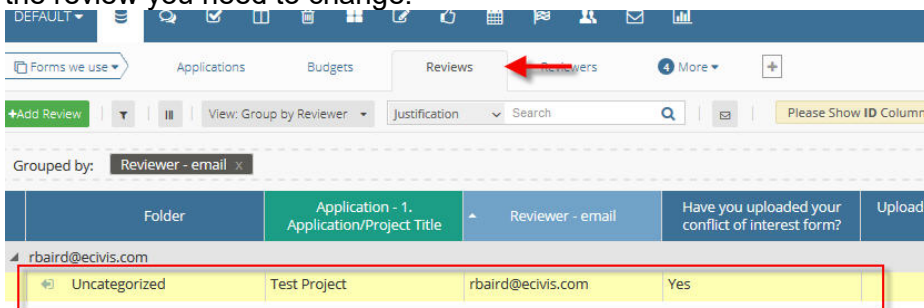


3. After selecting your assignment method, choose the submission, group, or member on the left side and the submission, group, or member it will be assigned to on the right:



## 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:



- Next, on the top right hand side of the page select *Revert to Draft*:

5776786

Revert to Draft

Uncategori...

Have you uploaded your conflict of interest form?

Yes required

Is there a conflict of interest on this review?

No required

## Reviewing Feedback/Scores

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

- 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.

2018 WFHF

Forms we use

Applications Budgets **Reviews** Reviewers More

+Add Review View Justification Search

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

Have you uploaded your conflict of interest form?	Upload conflict of interest form	Is there a conflict of interest on this review?	Can you still objectively perform this review?	Justification
---	----------------------------------	---	--	---------------

- 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:

Folder	submissionLink	Total Score	Programmatic Narrative
Not Started			
Not Started	Riverside Park Remodel	0	
In Progress			
In Progress	Water Purification	17	10
Submitted			
Submitted	Howard Basin Cleanup	53	10
Submitted	Standley Creek Sediment Reduction Project	31	6

- 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 <a href="#">Hu</a>
6	No previous project specifi...	79	Mountain Club Hazardous <a href="#">Elli</a>
7	The section does not refer...	83	Mountain Club Hazardous <a href="#">Sta</a>

- 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.

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

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 yea
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 DEVELOPMENT

Profile  
kyoung@ecivis.com

required

1. Application/Project Title  
REGION 5 WORKFORCE DEVELOPMENT

Search Folders...

- Uncategorized
- Draft
- 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:



The screenshot shows the eCIVIS dashboard with the following elements:

- Header: "Hello Srm3 Tester, your License is provided by Arizona" | Help / Training | Logout
- Navigation: Home, Grant Management, Grant Research, Reports, Administration
- Grant Management Dropdown: Project Dashboard, Project Search, My Projects, Project Calendar, Create Project, Organization Documents, **Subrecipient Management** (highlighted with a red box)
- Research: Find Grants
- Insight: Best Practices and More
- Organization Activity Summary Table:
 

Open Projects	Applications Due	Application Submitted	Organization Dashboard	Post Award Reports Due
42	0	1	9	10
- My Action Items: View Task List
  - Tasks (Next 7 Days): No pending items in next 7 days.
  - Past Due Items: No past due items.

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

The screenshot shows a program detail card with the following information:

- Program: Workforce Development Program (WDP) Grant - FY 2019 - \$1,250,000.00 total funding
- Department: Workforce Development
- Buttons: **View detail** (highlighted with a red box), Edit, Preview Application

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

The screenshot shows the 'Program Detail' page for 'Workforce Development Program (WDP) Grant - FY 2019' with the following sections:

- Program Detail:**
  - Department: Workforce Development
  - Total Funding: \$1,250,000.00
  - Application Period: 01/14/2019 - 08/31/2019
  - Buttons: 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
- Pending Awards Awaiting Recommendation:**

Search:

Project	Recipient Name	Action
Brewery School	Jeff Winger	<a href="#">Create Recommendation</a>
Job Incubator	Ulysses Grant	<a href="#">Create Recommendation</a>
Government Organization Workforce Development Program	David Shea	<a href="#">Create Recommendation</a>

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

Search:

Pending Awards Awaiting Recommendation

Project	Recipient Name	Action
Brewery School	Jeff Winger	<a href="#">Create Recommendation</a>
Job Incubator	Ulysses Grant	<a href="#">Create Recommendation</a>
Government Organization Workforce Development Program	David Shea	<a href="#">Create Recommendation</a>

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: HX1-082019-001

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:

Allocate Funding:

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

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

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

The screenshot shows a table with columns: File Name, Uploaded Date, File Size, and Actions. Below the table, it says "No files have been uploaded" and "Showing 0 to 0 of 0 entries". At the bottom, there are two buttons: "Send for Approval" (highlighted with a red box) and "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:

The screenshot shows the "Program Detail" page for the "Workforce Development Program (WDP) Grant - FY 2019". It includes a search bar, a table for "Award Recommendation Approval", and a section for "Pending Awards Awaiting Recommendation".

**Award Recommendation Approval Table:**

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

Showing 1 to 1 of 1 entries

Buttons: Reload, Approve, Reject

**Pending Awards Awaiting Recommendation Table:**

Project	Recipient Name	Action

## Making a Denial

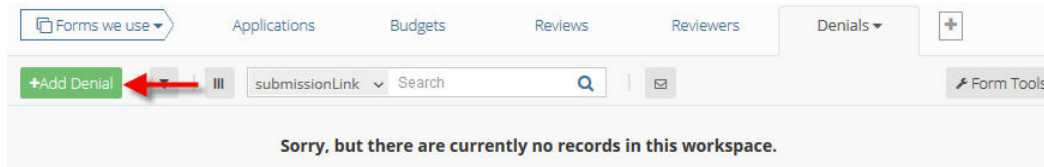
1. After you have completed the review/scoring process and have determined who will *not* be awarded, open the Denials form.

The screenshot shows the application management interface with tabs for Applications, Budgets, Reviews, and Reviewers. A "More" dropdown menu is open, showing options: Awards, Denials (highlighted with a red arrow), Profile, and Applicants. The main table below shows application details.

**Main Table:**

profileLink	1. Application/Project Title	2. Program/Project Congressional District (check all that apply)
<a href="#">catherine.berger@helensh</a>		
<a href="#">contact@faithsolutions2me</a>	Mental Health Ministry Vol...	8

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.

External Message

Save New Denial + 

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