

eCivis User Guide

Reviewer Admin Manual

Contents

Reviewer Portal URL	2
Adding and Removing Reviewers.....	2
Assigning Applications to Reviewers	3
Reopening a review	4
Reviewing Feedback/Scores	5
Making an Award.....	6
Making a Denial.....	7

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.

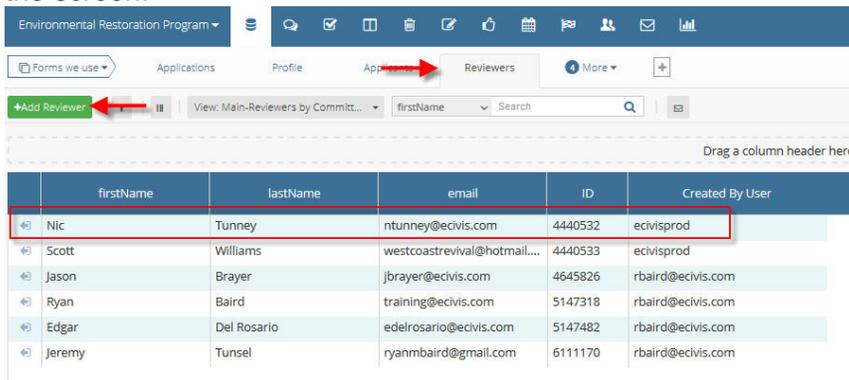
Example: https://webportalapp.com/portal/applications_example

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

To add or remove reviewers, go to the application workspace and select the *Reviewers* form.

1. To add a reviewer, select the green *Add Reviewer* button in the top left hand side of the screen.



	firstName	lastName	email	ID	Created By User
+	Nic	Tunney	ntunney@ecivis.com	4440532	ecivisprod
+	Scott	Williams	westcoastrevival@hotmail...	4440533	ecivisprod
+	Jason	Brayer	jbrayer@ecivis.com	4645826	rbaird@ecivis.com
+	Ryan	Baird	training@ecivis.com	5147318	rbaird@ecivis.com
+	Edgar	Del Rosario	edelrosario@ecivis.com	5147482	rbaird@ecivis.com
+	Jeremy	Tunsel	ryanmbaird@gmail.com	6111170	rbaird@ecivis.com

New Reviewer



Reviewer First Name required

Reviewer Last Name required

Reviewer Email required

of Reviews

Save New Reviewer

- To remove a user, select the name of the reviewer and then the red trash icon on the top right side of the screen:

Tunney, Nic

Reviewer First Name
 required

Reviewer Last Name
 required

Reviewer Email
 required

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*.

The screenshot shows a navigation bar with 'Program Manager' highlighted. Below it, a 'Reviews' section contains an 'Edit Assignments' button with a red arrow pointing to it.

- Assignments can be made by submission, group, or member. Select the method of assignment in the top left corner:

The dropdown menu shows 'Assign by Submission' selected. Below it is a table with columns for application name, number of assignments, number completed, and percentage completed.

	# ASSIGNMENTS	# COMPLETED	% COMPLETED
Standley Creek Sediment Reduction Project	1	1	100%
Underground Storage Tank Program	0	0	N/A
Water Purification	1	0	0%

- 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:

Assign by Member ▾

Search Members All ▾

MEMBER ▾	# ASSIGNMENTS ▾	# COMPLETED ▾	% COMPLETED ▾
Baird , Ryan	0	0	N/A
Baird , Ryan	1	1	100%
Brayer , Jason	0	0	N/A
Del Rosario , Edgar	0	0	N/A

Baird , Ryan Assign ▾

SUBMISSIONS (2)

Enter the name of a submission...

Underground Storage Tank Prog

Riverside Park Res Water Purification

Reopening a review

- To reopen a review that has already been submitted, go to the *Review* tab. Select the review you need to change:

DEFAULT ▾

Forms we use ▾ Applications Budgets **Reviews** Reviewers More ▾ +

+Add Review ▾ | View: Group by Reviewer ▾ Justification ▾ Search 🔍 | Please Show ID Column

Grouped by: Reviewer - email x

Folder	Application - 1. Application/Project Title	Reviewer - email	Have you uploaded your conflict of interest form?	Upload
rbaird@ecivis.com	Uncategorized Test Project	rbaird@ecivis.com	Yes	

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

5776786 Revert to Draft

Uncategori...

Have you uploaded your conflict of interest form?

Yes required

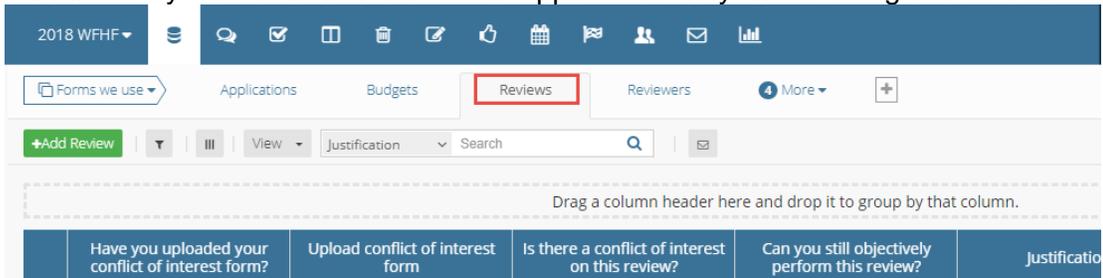
Is there a conflict of interest on this review?

No required

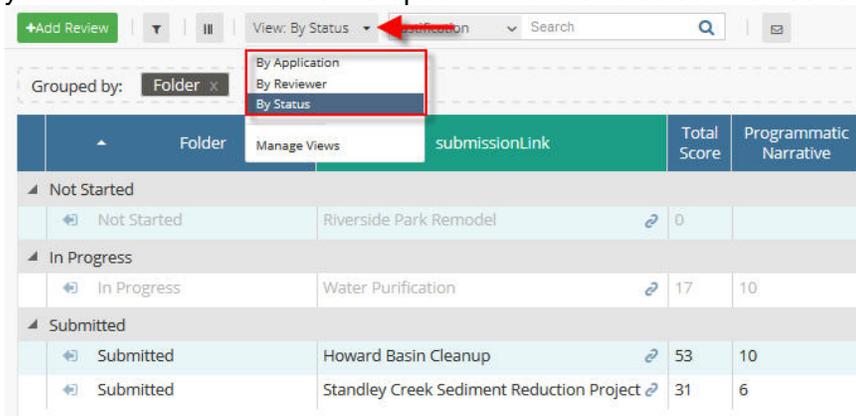
Reviewing Feedback/Scores

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

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:

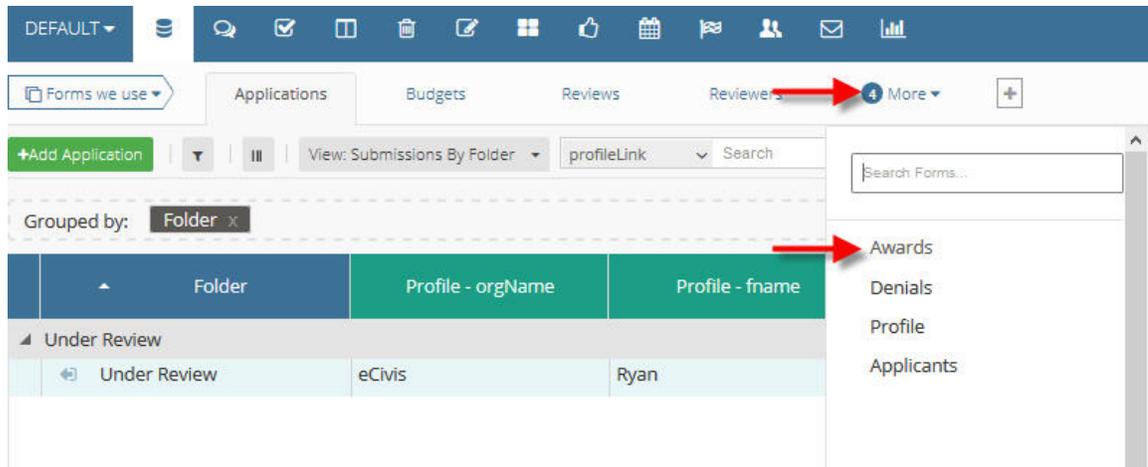
10. Program Specific Criteria #3 (Organization Capability)	Comments	Total Score	submissionLink
8	no previous projects listed, ...	76	Mountain Club Hazardous Hu
6	No previous project specifi...	79	Mountain Club Hazardous Elli
7	The section does not refer...	82	Mountain Club Hazardous Sta

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:

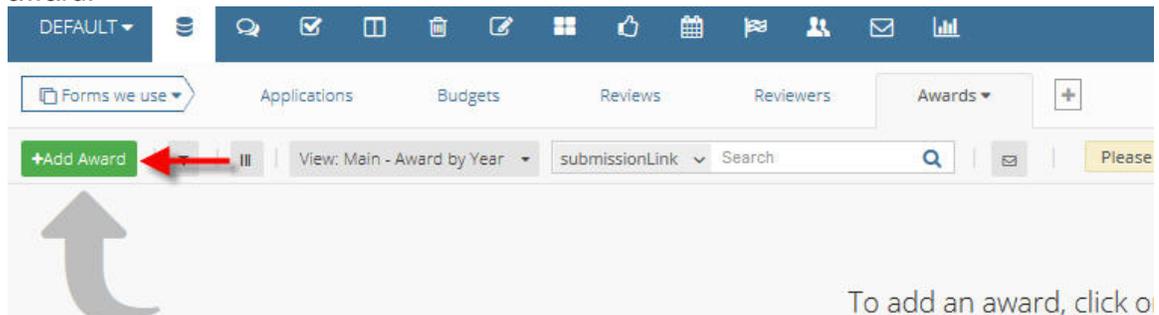
Letters	Average Score	# of Awards	# of Reviews	# of Denials	Total Awarded A
2018 WFHF Sprt Ltrs-OFD.p...	74.14	0	7	0	0.00
PNF Letter of Support.pdf	76.00	0	7	0	0.00
	69.86	0	7	0	0.00
Letters of support.pdf	77.86	0	7	0	0.00
	58.17	0	6	0	0.00
Letters of Support.pdf	78.00	0	7	0	0.00

Making an Award

1. After you have completed the review/scoring process and have determined who will receive an award, open the *Awards* form.



2. Select the *Add Award* button on the top left side of the page to begin entering an award.



3. 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. This note will be included in the body of the email notification once the award form is saved.
 - 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
4. After all applicable fields have been updated, select *Save New Award* at the bottom of the form.

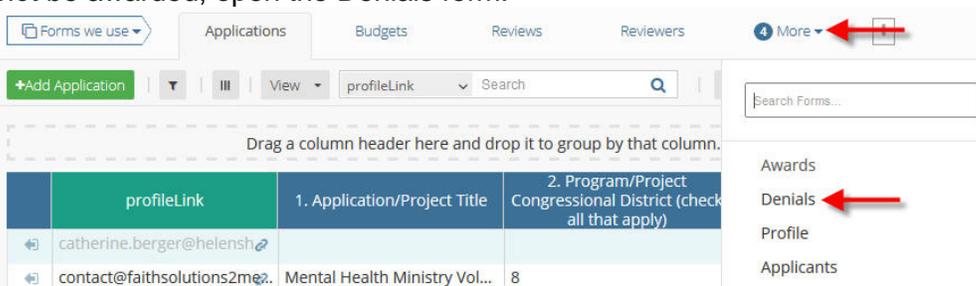
Notes



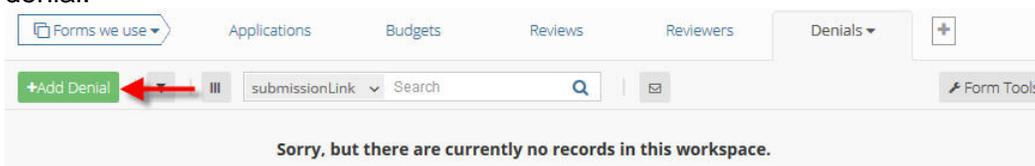
5. After saving the new award, an email will be sent to the applicant notifying them of the award, including the External Note.

Making a Denial

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



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.