State of Indiana eCivis Grants Portal Subrecipient User Guide

Award & Management for Subrecipients
November 2023

Contents

Definitions

Agency eCivis User – A user of eCivis Grants Network. This is a State of Indiana staff person using the system as a Grantee or Grantor. See Grantee and Grantor.

Application Workspace – An Application Workspace is created for authorized Agency eCivis users to view and create their application and evaluation forms outside of any State of Indiana required fields for competitive solicitations It will also include the budget selected at solicitation, but it is not editable. The Application Workspace allows Agency eCivis users to identify application review team members, make application review assignments, and tabulate review results and scores. See also Solicitation and Zengine.

Award Approval Package – The collection of documents, within a task, which support the finalization of a grant award captured in eCivis Grants Network. This includes an auto-generated award notice from eCivis Grants Network, awarded budget, and goal setting (if enabled as part of the solicitation setup)—along with any specific documents uploaded and provided to the Subrecipient by the Grantor (agreement, further post-award guidance, reporting template, etc.).

Budget – The financial information Applicants are required to submit to the Funder or Grantor detailing how they will spend grant funds, if awarded. This budget is carried over to the awarded grant so that the Grantee or Subrecipient reports financial information at the level of detail required by each grant program.

Cash Match – A portion of project costs not paid by Federal funds as a direct project expense (*2 CFR 200.306*). This portion of the project costs are provided as cash from the Indiana State Agency or State of Indiana resources.

eCivis – The software vendor that created eCivis Grants Network (Indiana State Agencies as Grantees/Grantors) and eCivis Grants Portal (Applicants/Subrecipients to Indiana State Agencies' grant programs).

eCivis Project – Project is used in two ways within eCivis Grants Network, Grantee project and Grantor project. See Grantee Project and Grantor Project.

Financial Report (Payment or Reimbursement Request) – The task assigned to a Grantee or Subrecipient to submit financial data. Financial reports can also include payment or reimbursement requests within them. These reports are usually recurring in nature through the grant term.

Grant Amendment – An amendment (either initiated by the Grantor or Grantee/Subrecipient) that will officially change the terms of the agreement. An amendment can edit the scope of work, grant term, or financial information.

Grantee – Persons or organizations who receive funding from another party. Indiana State Agencies operate in the role of a Grantee when they receive funding from external parties like the Federal government. A Grantee is also referred to as a Subrecipient.

Grantee Project – Indiana State Agencies can manage grants that they pursue from pre-award to post-award by creating a project.

Grantor – Persons or organizations that provide grant funding to another party. Indiana State Agencies operate as Grantors when they distribute grant funds to Subrecipients (Grantees). Also, referred to as a Funder.

Grantor Project – A project title is required for each application submitted by an Applicant and an award granted by an Indiana State Agency. The Subrecipient or the Grantor (Indiana State Agency) can edit the project title at any time. The project title is called Project or Project Name in eCivis Grants Network.

Grants Network (GN) – The eCivis name for the software. eCivis also refers to the system as "eCivis," "eCivis Grants Network," or "GN."

In-Kind Match (Third-Party In-Kind Contribution) – The value of a non-cash contribution (i.e., property or services) that—(1) benefit a Federally-assisted project or program; and (2) are contributed by non-Federal third parties, without charge, to a non-Federal entity under a Federal award (*2 CFR 200.1*).

Notice of Funding Opportunity (NOFO) – A formal announcement of the availability of funding through a financial assistance program from an awarding agency.

Portal (eCivis Grants Portal) – The public-facing portal for Applicants of all Indiana State Agency grant programs released in eCivis Grants Network. URL: *https://portal.ecivis.com/#/login*.

Program – The release of funds to Subrecipients. Programs are also referred to as "grant programs." For example, The Office of Community and Rural Affairs releases a grant program to accept applications for the Community Development Block Grant (CDBG) application.

Reimbursement Request – The process a Subrecipient undertakes in eCivis to be reimbursed for allowable program activity. This is completed through the financial reporting feature in eCivis Grants Network, indicating that it is a reimbursement request.

Solicitation – The public-facing notification of available grant funding. The solicitation setup in eCivis Grants Network creates either public-facing or internal content, dependent upon program-specific settings. See Notice of Funding Opportunity (NOFO).

Subrecipient – An entity that receives a grant from an Indiana State Agency utilizing eCivis Grants Network. Also, it can be referred to as a Grantee of the Indiana State Agency.

Subrecipient Award Owner – The initial Subrecipient representative awarded by the Grantor in eCivis Grants Network is established as the Subrecipient Award Owner. If needed, the Grantor can transfer award ownership in eCivis Grants Network.

Zengine – The third-party tool used for the configuration of online applications, application review forms, assignment of reviewers to applications, and online review and scoring of submitted grant applications. This is also referred to as the Application Workspace.

Purpose

The purpose of this user guide is to provide instructions to Subrecipients administering their award(s) in the eCivis Grants Portal. This guide will discuss how to manage team members, submit activity and financial reports, and request grant amendments.

Step 1: Accepting or Declining the Award

Once the application has been approved, the Applicant will be notified by email. This email will also contain a PDF file of the award notification.

1) After receiving this email, the Applicant will click the email link to the award. This will prompt the Applicant to log into the *eCivis Grants Portal*.

Award Notification Letter

Dear Applicant,

Congratulations! An award package has been created for the following program:

Project:	IDOE Award #1
Program:	IDOE - TEST
Approved Amount:	$135,000.00
Federal Awards:	• US17341 Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021: $135,000.00
	○ Agency: U.S. Department of the Treasury
	○ Fiscal Year: 2021
	○ CFDA: 21.027
	Total Federal: $135,000.00
Other Awards:	No non-federal funds were included in this award.
Total Match:	$0.00
Period of Performance:	07/01/2023 - 06/30/2024
Award/Contract Number:	IDOE - 2023 - 0001

Note from grantor:
Congratulations on your award!

Please find your award letter attached. To see full award details and accept your award, please click here.

For any questions pertaining to this award package, please contact your grantor at:

    agencyecivisuser@sba.IN.gov

Please contact support@ecivis.com for technical issues or questions.

Sincerely,

Program Manager
Phone Number
Address

2) The Applicant will see that the **Award Status** has changed to *Pending Acceptance* within the corresponding eCivis **Project Title.** Click the *Horizontal Lines icon* ☰ and then *Accept/Decline Award*.

Grant Title	Project Title	Award/Contract Number	Award Type	Award Status	Notification Date	Performance Period	Role	Actions
State of Indiana Title IV (V2)	Northeastern School District Application	DOE-FY23-00006	N/A	Pending Acceptance	N/A	5/1/23 - 11/30/23	Owner	☰
								Accept/Decline Award >
		N/A	N/A	Awarded	03/15/2023	3/1/23 - 3/3		

3) The Applicant will land on a page with the opportunity to download files, such as an Award Letter. Please refer to any specific program guidance provided by the Grantor Indiana State Agency on whether these files must be downloaded or not. Click the *Continue button* Continue .

Award Acceptance

State of Indiana Title IV (V2) Pending Acceptance

Offered by: WOB Demo
Project Title: Northeastern School District Application
Approved amount: $130,000.00
Match type:
Performance period: 05/01/2023 -11/30/2023

DOWNLOAD FILES — FINALIZE BUDGET — ATTACH FILES

The grantor has attached the following files for you to download. Please download and review any files before continuing.

Award Files

Show 10 entries   Search:

File Name	File Size	Actions
Approval File: awardNotification.pdf		☁

Showing 1 to 2 of 2 entries   Previous 1 Next

Continue   Decline Award   Back

4) The new page will prompt the Applicant to review and finalize the budget based on the Applicant's award amount. It will also contain communication from the Grantor Indiana State Agency regarding the Applicant's originally submitted budget.

The Applicant may make updates to their budget by the specific program's categories, as needed. Besides this budget action, there is a required narrative section to provide context to the stated budget categories and amounts entered.

Click the *Save Changes button* Save Changes , followed by the *Accept and Continue button* Accept and Continue at the bottom of the page.

a. There may be a difference between the award amount requested and the amount awarded. If the Applicant believes there is an error with their award, the Applicant can contact the Grantor Indiana State Agency by selecting the *Request Budget Change button* `Request Budget Change`, which will notify the Grantor Indiana State Agency that the Applicant would like a revision to their award. The Grantor Indiana State Agency will review and communicate its approval or rejection of that revision.

5) If the Applicant is required by the Grantor Indiana State Agency's specific program guidance to upload files, select the *Upload File button* `Upload File ☁`, as shown below.
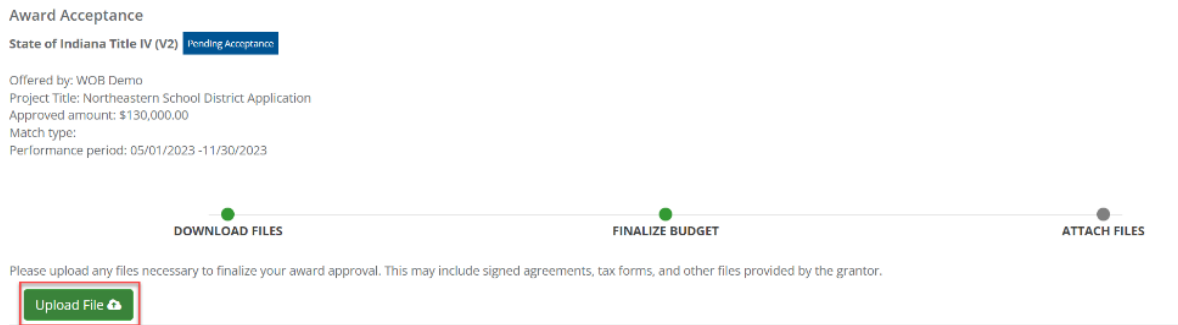
Please review the specific program guidance and any communications regarding the award to ensure all documents are submitted. If the Grantor Indiana State Agency established goals for this solicitation, the Applicant may see an additional step labeled **Finalize Goals**. In this screen, the Applicant may view, edit, or accept target units.

6) Click the *Finalize and Submit button* `Finalize and Submit` if the Applicant would like to accept the award.
    a. If the Applicant changed any of the award details, the screen will no longer show the *Finalize and Submit button* `Finalize and Submit`, and will rather display a *Return to Grantor button* `Return to Grantor`. This action returns changes to the Grantor Indiana State Agency.
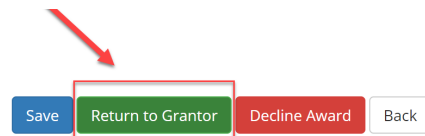
NOTE: Once the Applicant accepts the award, the Applicant becomes registered as a Subrecipient in eCivis Grants Network.

    b. If declining the Award Acceptance, click *Decline Award button* `Decline Award`.
        If the Applicant desires to change award details or the budget,
                do not click the *Decline Award button* `Decline Award`.

Award Acceptance

State of Indiana Title IV (V2) [Pending Acceptance]

Offered by: WOB Demo
Project Title: Northeastern School District Application
Approved amount: $130,000.00
Match type:
Performance period: 05/01/2023 -11/30/2023

● DOWNLOAD FILES ————————— ● FINALIZE BUDGET ————————— ● ATTACH FILES

Please upload any files necessary to finalize your award approval. This may include signed agreements, tax forms, and other files provided by the grantor.

[Upload File ☁]

Award Files

Show [10 ▼] entries   Search: [   ]

File Name	↕	File Size	↕	Actions	↕
No files have been uploaded					

Showing 0 to 0 of 0 entries   [Previous] [Next]

[Save] [Finalize and Submit] [Decline Award] [Back]

NOTE: If *Decline Award* is selected, the award process ends, and the Applicant may not reverse this decision. If the award was declined erroneously, please contact the Grantor Indiana State Agency.

c. Upon clicking the *Decline Award button* [Decline Award], an additional screen will appear. A note to the Grantor Indiana State Agency is required regarding the award decline. Click the *Save button* [Save] to finish the award denial.

Decline Award   ×

Are you sure you wish to decline this award? Please enter a note to the awarding pass-through entity: *

[   ]

5000 characters remaining.

[Cancel] [Save]

7) Once the award has been accepted and submitted, the Grantor Indiana State Agency will receive the award and begin their review. The Applicant will see the Award Status update to "*Pending Final Approval.*"

My Awards   ⌃

Show [10 ▼] entries   Search: [   ]

Grant Title ↕	Project Title ↕	Award/Contract Number ↕	Award Type ↕	Award Status ↕	Notification Date ↕	Performance Period ↕	Role ↕	Actions ↕
Indiana Title IV	Southern School District	N/A	N/A	Pending Final Approval	N/A	8/1/23 - 3/30/24	Owner	☰

Step 2: Viewing Award Details

The Subrecipient can complete the following steps to locate their award:

1) On the **eCivis Grants Portal** homepage, the Subrecipient will now see that the **Award Status** of the corresponding **Grant Title/Project Title** will be *Awarded*.
   a. The Applicant can also navigate to their award using the *My Awards* tab located at the left of the page.

2) To view further details of the award, click the *My Awards* tab, select the *Horizontal Lines icon* ☰ under the **Actions** column, and then click *Manage Award*.

3) This will bring the Subrecipient to the **Award Dashboard** which displays information regarding the Subrecipient's award. To view more information about the funding source, or "Funding Details", click the *Plus Sign icon* + next to the **Approved Amount**.

4) If there was a budget component with the application and award process, it can be viewed in the **Award Dashboard**. Click the *View Budget button* View Budget to view the approved budget. This will bring the Subrecipient to the **Application Budget** screen.

a. This can also be exported to Excel by clicking the *Excel logo icon* in the **Application Budget**.

5) In this screen, a more detailed budget can be viewed by clicking on *Budget Items*, followed by a specific budget category.

Step 3: Adding Additional Team Members to an Award

1) The Subrecipient Award Owner, or the individual who first submitted the awarded application, may add additional team members to assist with the award. In terms of viewing and submitting reports, all team members will have the same permissions and level of access to view and submit reports to the Grantor Indiana State Agency. If the notifications checkbox is selected, Subrecipient team members will receive notifications—via an eCivis Grants Network email—when a task has been submitted, approved, rejected, or returned. This is further shown in the step 5) of this section.

   a. If the Subrecipient Award Owner is no longer able to access eCivis Grants Portal, the Grantor Indiana State Agency can change the Subrecipient Award Owner. If this is the case, please contact the Grantor Indiana State Agency.

2) In the eCivis Grants Portal's **My Awards** tab, the Subrecipient Award Owner will click the corresponding eCivis **Project Title** to which it would like to add team members.

3) In the **Award Dashboard**, click the *Manage Project Team button* Manage Project Team .

4) Click the *Add Team Member button* Add Team Member .
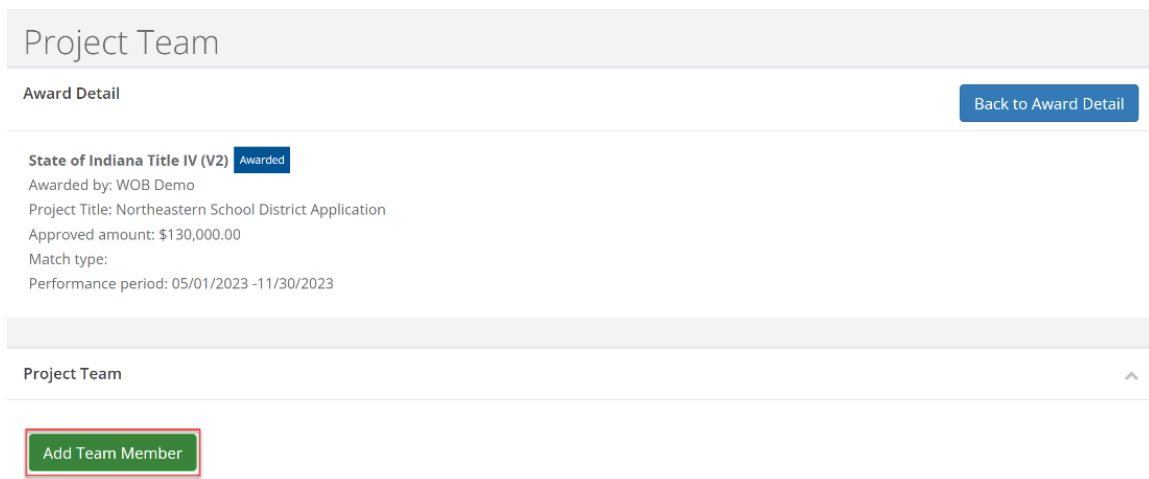
5) The system will prompt the Subrecipient to enter the email address of the additional team member. If the *Receive notifications for this award* checkbox is selected, the team member will receive notifications for the award such as due dates, Subrecipient monitoring, and reminders for tasks. Only one team member can be added at a time.

Once the email address has been entered, click the *Add Member button* Add Member .

Add Project Team Member

The following person will be invited to your project to help collaborate.

Email address:

☐ Receive notifications for this award.

Cancel   Add Member

6) eCivis Grants Network will then send an invitation email to the entered email address. The corresponding team member's row in the eCivis **Project Team** table will appear as *Pending*. This means the email was successfully sent. In this table, the Subrecipient Award Owner can resend or revoke the invitation or revoke access to team members.

Project Team

Add Team Member

Show 10 ∨ entries   Search:

Invitation Email	Accepted By	Status	Actions
agencyecivisuser@SBA.IN.gov		Pending	≡

7) The prospective team member will need to accept the invitation by clicking on the link provided in the email invitation. Please see *Step 3a: Accepting the Invitation to Join the Grant Project Team* for more information about accepting the invitation.

has invited you to join their grant project team on the eCivis Portal.

Project Name: Northeastern School District Application

Please use the following link to respond. You may be required to create a free account if you do not already have an account on the eCivis Portal:

https://portal.ecivis.com/#/loginTeam/7D970F63-A205-4119-B565-6E0924049FE9

8) Once the prospective team member completes the appropriate steps to be added to the eCivis Project, the team member's row in the **Project Team** table will read *Accepted* under the **Status** column.
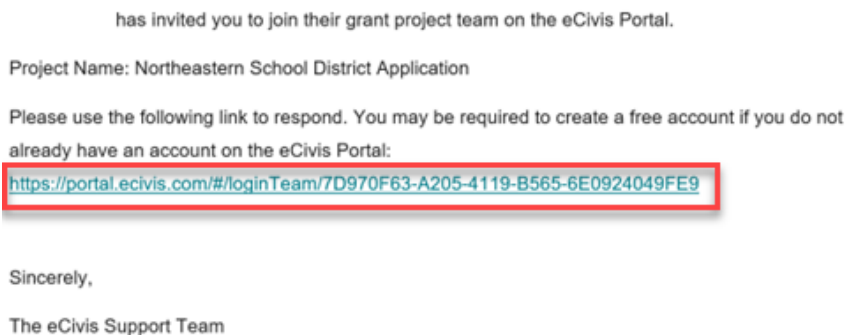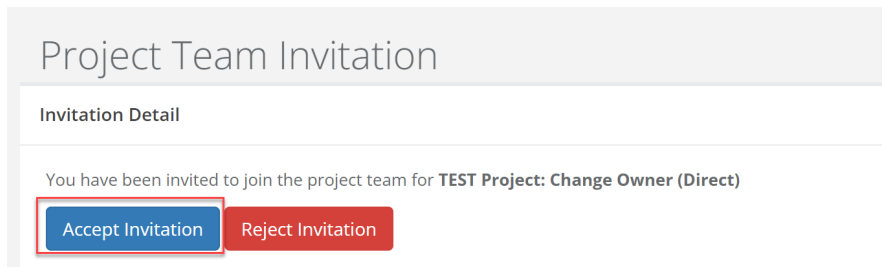
Project Team   ⌃

Add Team Member

Show 10 ∨ entries   Search:

Invitation Email	Accepted By	Status	Actions
		Accepted	≡

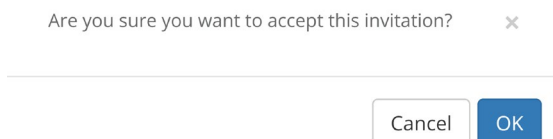## Step 3a: Accepting the Invitation to Join the Grant Project Team

1) Once the Subrecipient Award Owner has entered the prospective team member's email into the eCivis project, the prospective team member will receive an email from eCivis Grants Network.

2) The prospective team member will click on the link provided within the invitation email.
   a. If an email is not received, please notify the Subrecipient Award Owner as they can resend an invitation and verify that the email address was entered correctly.

has invited you to join their grant project team on the eCivis Portal.

Project Name: Northeastern School District Application

Please use the following link to respond. You may be required to create a free account if you do not already have an account on the eCivis Portal:

https://portal.ecivis.com/#/loginTeam/7D970F63-A205-4119-B565-6E0924049FE9

Sincerely,

The eCivis Support Team

3) Once the link in the invitation email (shown above) has been clicked, log into the corresponding homepage. If the prospective team member does not have an account with the eCivis Grants Portal, reference the *SOI User Guide - Grantor 1. Creating a Solicitation* to create one prior to clicking on the link in the invitation email.

4) The prospective team member will then see the **Project Team Invitation** screen. Click the *Accept Invitation button* Accept Invitation .

Project Team Invitation

Invitation Detail

You have been invited to join the project team for **TEST Project: Change Owner (Direct)**

Accept Invitation   Reject Invitation

5) The next screen will prompt a verification. Click the *OK button* OK to verify.

Are you sure you want to accept this invitation?   ✕

Cancel   OK

6) Once this verification step has been completed, the team member will be taken to the **My Awards** tab. The system will note the team member's eCivis Grants Portal Account as a **Team Member** under the **Role** column.
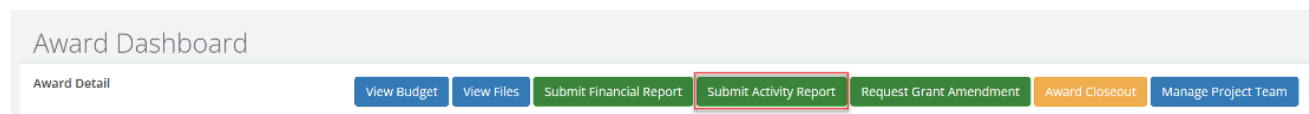
Grant Title	Project Title	Award/Contract Number	Award Type	Award Status	Notification Date	Performance Period	Role
State of Indiana Title IV (V2) Application	Northeastern School District	DOE-FY23-00006	N/A	Awarded	07/25/2023	5/1/23 - 11/30/23	Owner

7) Click the *Horizontal Lines icon* ☰ under the **Actions** column, and then *Manage Award* to begin accessing the award.

Grant Title	Project Title	Award/Contract Number	Award Type	Award Status	Notification Date	Performance Period	Role	Actions
		N/A	N/A	Awarded	03/15/2023	3/1/23 - 3/31/23	Team Member	☰
								Manage Award ›

Step 4: Submitting Activity Reports

1) In the **Award Dashboard**, the Subrecipient Award Owner and team members can submit activity reports directly to the Grantor Indiana State Agency. The activity reports can be submitted in relation to reporting tasks automatically established by the Grantor Indiana State Agency as part of the award or submitted ad-hoc. Click the *Submit Activity Report button* [Submit Activity Report] to begin.

Award Dashboard

Award Detail [View Budget] [View Files] [Submit Financial Report] [Submit Activity Report] [Request Grant Amendment] [Award Closeout] [Manage Project Team]

2) In the **Activity Report Details**, click the **Reporting Period*** text box to provide the dates of the activity report. This field is required. Click the *Apply button* [Apply] when finished.

Activity Report

Reporting Period: *

| 📅 07/25/2023 | 📅 07/25/2023 | [Apply] [Cancel] |

‹	Jul 2023						Aug 2023					›
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	1	30	31	1	2	3	4	5

3) Under **Report Narrative***, enter a brief description of the activity report in the text box.

Please develop your narrative below including key metrics, and other pertinent details.

Report Narrative: *

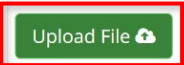| </> | H1 | H2 | H3 | **B** | *I* | <u>U</u> | ☰ | ☷ | ☶ | ☵ | 🔗 |

8000 characters remaining

4) If applicable under **Activity Report Metrics**, Subrecipients may enter updates to the goals defined by the Grantor Indiana State Agency.

Goal / Objective	Completed Units	Award Spend	Match Spend	Program Income Spend	
Number of Beneficiaries Assisted	10.00	$ 0.00	$ 0.00	$ 0.00	
Subgoals					
Number of Children Assisted ⌄	10.00	$ 0.00	$ 0.00	$ 0.00	/ -
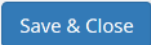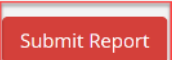
5) Files may also be uploaded under the **Activity Report Files** tab by clicking on the *Upload File button* [Upload File ☁].

Activity Report Files

Please upload any files necessary for your activity report.

[Upload File ☁]

6) When all information is entered, click the *Submit Report button* [Submit Report].

[Save & Close] [Submit Report] [Cancel]

7) A warning page will appear notifying the Subrecipient that this report will be sent to the Grantor Indiana State Agency. Click the *OK button* [OK].

Warning!

Are you sure you want to submit your activity report? This will send the contents of this form to the grantor for approval.

[Cancel] [OK]

8) If the report is associated with an assigned **Activity Report Task** in the **Pending Tasks** table, click the *Horizontal Lines icon* ≡ next to the corresponding task and click *Mark Task Complete.*


Step 5: Submitting Financial Reports

1) In the **Award Dashboard**, the Subrecipient Award Owner and team members can submit financial reports directly to the Grantor Indiana State Agency. As with activity reports, financial reports can be submitted in relation to reporting tasks that are automatically established by the Grantor Indiana State Agency as part of the award or can be submitted on an ad-hoc basis.

Click the *Submit Financial Report button* Submit Financial Report to begin.
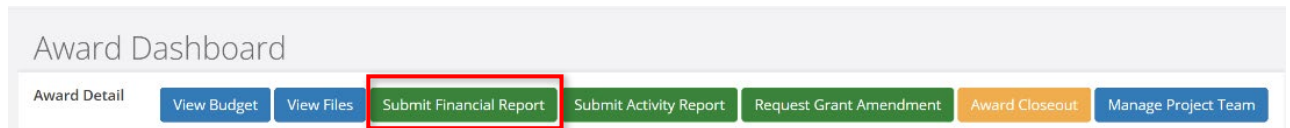
2) The **Award Detail** on the page that follows provides a summary of award information.

3) The **Award Financial Overview** is not editable, and automatically updates when new amounts are submitted in **Financial Report Details**. When completed, a summary of the Award Total Spend to Date and the Award Remaining to Date will appear.

Award Financial Overview

This overview will update in real time as you complete your financial request. The data here reflects all submitted spending reports, even those still in the approval process.

Payments Received To Date	Advance	Reimbursement	Total Disbursed	Pending Disbursement
	$ 0.00	$ 0.00	$ 0.00	$ 0.00

	Spend		Match		Spend + Match
Award Total Spend to Date	$ 0.00		$ 0.00		$ 0.00
	0.00	%	0.00	%	
Award Remaining to Date	$ 130,000.00		$ 0.00		$ 130,000.00

Award Total Program Income	Received	Expended
	$ 0.00	$ 0.00

4) In the **Financial Report Details**, click the **Reporting Period***** text box to provide the start and end dates of the relevant reporting period. This field is required, as denoted by the red asterisk (*****). Click the *Apply button* Apply when finished.

Reporting Period: *

07/24/2023 - 07/31/2023

📅 07/03/2023   📅 07/31/2023   [Apply] Cancel

‹		Jul 2023							Aug 2023				›
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	1	30	31	1	2	3	4	5
2	3	4	5	6	7	8	6	7	8	9	10	11	12
9	10	11	12	13	14	15	13	14	15	16	17	18	19
16	17	18	19	20	21	22	20	21	22	23	24	25	26
23	24	25	26	27	28	29	27	28	29	30	31	1	2
30	31	1	2	3	4	5	3	4	5	6	7	8	9

5) When the **Reporting Period** is entered, the following screen will prompt the Subrecipient to enter spend and match amounts. This field is required.
   a. **Spend** is the amount of grant award funds spent.
   b. **Match** is the amount of match funds spent.

Reporting Period: *

07/03/2023 - 07/31/2023

Category	a) Spend	b) Match	Award Approved	Match Approved	Award Remaining	Match Remaining	Total Remaining
1. Personnel	$ 20,000.00	$ 0.00	$ 100,000.00	$ 0.00	$ 80,000.00	$ 0.00	$ 80,000.00
2. Fringe Benefits	$ 5,000.00	$ 0.00	$ 20,000.00	$ 0.00	$ 15,000.00	$ 0.00	$ 15,000.00
Report Total	Spend	Match	Total Award Approved	Total Match Approved	Total Award Remaining	Total Match Remaining	Total Remaining
	$ 25,000.00	$ 0.00	$ 130,000.00	$ 0.00	$ 105,000.00	$ 0.00	$ 105,000.00
	100.00 %	0.00 %		0.00 %	0.00 %	0.00 %	0.00 %

6) The Subrecipient may only report categories that have been awarded. If a category is grayed out, the category was not awarded (refer to *3. Travel* and *4. Equipment* below) and can only be edited through a budget modification (amendment) from the Grantor Indiana State Agency. Please contact the Grantor Indiana State Agency if a budget modification is necessary.
   a. See *[Step 6: Submitting a Grant Amendment](#)* for more information.

Reporting Period: *

07/03/2023 - 07/31/2023

Category	Spend	Match	Award Approved	Match Approved	Award Remaining	Match Remaining	Total Remaining
1. Personnel	$ 20,000.00	$ 0.00	$ 100,000.00	$ 0.00	$ 80,000.00	$ 0.00	$ 80,000.00
2. Fringe Benefits	$ 5,000.00	$ 0.00	$ 20,000.00	$ 0.00	$ 15,000.00	$ 0.00	$ 15,000.00
3. Travel	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
4. Equipment	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
5. Supplies	$ 0.00	$ 0.00	$ 10,000.00	$ 0.00	$ 10,000.00	$ 0.00	$ 10,000.00

7) The **Spend**, **Match**, and **Award Remaining** columns will automatically calculate the costs when the **Spend** and **Match** amounts are updated. Additionally, the **Report Totals** will automatically calculate the breakdown of the amounts and percentages of funds declared in the **Reporting Period***.

Reporting Period: *

07/03/2023 - 07/31/2023

Category	Spend	Match	Award Approved	Match Approved	Award Remaining	Match Remaining	Total Remaining
1. Personnel	$ 20,000.00	$ 0.00	$ 100,000.00	$ 0.00	$ 80,000.00	$ 0.00	$ 80,000.00
2. Fringe Benefits	$ 5,000.00	$ 0.00	$ 20,000.00	$ 0.00	$ 15,000.00	$ 0.00	$ 15,000.00
3. Travel	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
4. Equipment	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
5. Supplies	$ 0.00	$ 0.00	$ 10,000.00	$ 0.00	$ 10,000.00	$ 0.00	$ 10,000.00
6. Contractual	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
7. Construction	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
8. Other	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
Report Total	**Spend**	**Match**	**Total Award Approved**	**Total Match Approved**	**Total Award Remaining**	**Total Match Remaining**	**Total Remaining**
	$ 25,000.00	$ 0.00	$ 130,000.00	$ 0.00	$ 105,000.00	$ 0.00	$ 105,000.00
	100.00 %	0.00 %		0.00 %	0.00 %	0.00 %	0.00 %

8) If seeking reimbursement as part of the financial report, click the *Reimbursement Request* checkbox. The text box will automatically populate with the amount from the **Spend** column. If this amount is different, please change it to the correct amount requested for reimbursement. Amounts can be different due to programmatic reasons, such as prior reimbursements or forward payments.

Report Total	Spend		Match		Total Award Approved		Total Match Approved	
	$ 25,000.00		$ 0.00		$ 130,000.00		$ 0.00	
	100.00	%	0.00	%			0.00	%
Program Income	Received		Expended					
	$ 0.00		$ 0.00					

☑ Reimbursement Request*

$ 25,000.00

9) At the bottom of the page, include any spending details and a brief description of the financial report in the required **Financial Report Narrative** text box.

Financial Report Narrative *

Please develop your narrative below including key metrics, spending details, and other pertinent details.

</> H1 H2 H3 B I U ≡ ≡ ≡ ≡ ⸱

8000 characters remaining

10) Files may also be uploaded under the **Financial Report Files** tab by clicking the *Upload File button* [Upload File ☁]. This is where Subrecipients can upload invoices and other supporting documentation.

Financial Report Files

Please upload any files necessary For your financial report. This may include financial transactions, receipts, program income, etc…

[Upload File ☁]

Show 10 ⌄ entries   Search:

11) When all the information is entered, click [Submit Report].

File Name	⇅	File Size	⇅	Actions	⇅
		No files are available for download			

Showing 0 to 0 of 0 entries   Previous   Next

[Save & Close] [Submit Report] Cancel

12) A warning page will appear notifying the Subrecipient that this report will be sent to the Grantor Indiana State Agency. Click the *OK button* OK .

> **Warning!**
>
> Are you sure you want to submit your activity report? This will send the contents of this form to the grantor for approval.
>
> Cancel   OK

13) Under the **Award Detail** page, the Financial Report will now be recorded under **Award Activities**. The **Current Status** column will change depending on the Grantor Indiana State Agency's actions.
    a. **Pending Approval:** The financial report has not been reviewed.
    b. **Rejected:** The financial report was rejected for reimbursement.
    c. **Approved/Awaiting Payment:** The financial report has been reviewed and payment is pending.
    d. **Approved/Paid:** The reimbursement is fully completed.
    e. **Approved:** The financial report has been reviewed and fully processed. No reimbursement or payment was requested.
    f. **Changes Requested:** The financial report has been reviewed and it has been returned to the Subrecipient for changes or edits.

Award Activities

Show 10 ✔ entries   Search: [   ]

Report	Reporting Period	Created By	Date Submitted	Current Status	Actions
Financial Report	07/03/2023 -- 07/31/2023	Alec Eulano	07/25/2023	Pending Approval	View Report
Activity Report	06/02/2023 -- 06/09/2023	Alec Eulano	07/25/2023	Pending Approval	View Report

Showing 1 to 2 of 2 entries   Previous 1 Next

Reload
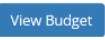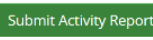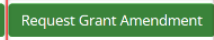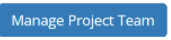
Step 6: Submitting a Grant Amendment

The award's programmatic, and/or financial, details can be amended by submitting a request through the eCivis Grants Portal. Only one amendment can be submitted at a time.

1) From the **Award Dashboard,** click the *Request Grant Amendment button* Request Grant Amendment .

Award Dashboard

Award Detail   [View Budget] [View Files] [Submit Financial Report] [Submit Activity Report] [Request Grant Amendment] [Award Closeout] [Manage Project Team]

Subrecipient: Northeastern School District Application
Project: Northeastern School District Application
Award Status: Awarded
Approval Date: 07/25/2023
Approved amount: $130,000.00 [+]
   Total Federal Award: $130,000.00

Total Match: $0.00
Performance period: 05/01/2023 - 11/30/2023

2) The next screen will display the following pre-populated information under the **Award Details** page. In rare cases, these fields may need to be adjusted. **Do not edit these fields unless instructed to do so**. Click the *Continue button* `Continue` to move forward with the amendment request.
   a. Organization Name
   b. Project Name
   c. EIN (Employer Identification Number)
   d. Performance Period End

Grant Amendment

AWARD DETAILS   FINANCIAL INFORMATION   ATTACH FILES

Please edit the appropriate information below.

Organization Name:*   Northeastern School District Ap

Project Name:*   Northeastern School District Ap

EIN: [   ]   (12-1234567)

Performance Period End:*   11/30/2023

Save   Cancel   Continue

3) In the **Financial Information** page, if the amendment requires a financial change, click the *This amendment includes a financial change* checkbox.

Grant Amendment

AWARD DETAILS   FINANCIAL INFORMATION   FINALIZE GOALS   ATTACH FILES

☑ This amendment includes a financial change

4) When the box is checked, an additional screen will appear containing the grant award budget. The budget line items can be adjusted here. If the Grant Amendment does not include a financial change, the Subrecipient will click the *Continue button* `Continue`.

Back   Save   Cancel   Continue

   a. If there is a financial report pending approval by the Grantor Indiana State Agency, a Subrecipient **cannot submit a Grant Amendment with a financial change.**
      As shown in the screenshot below, a Note will appear, and the Subrecipient will be unable to click the checkbox labeled "*This amendment includes a financial change*".

Grant Amendment

AWARD DETAILS   FINANCIAL INFORMATION   ATTACH FILES

☐ This amendment includes a financial change

Note: A grant amendment with a financial change cannot be created at this time due to a pending financial report.

Back   Cancel   Continue

b. The process for amending each budget item is the same process as creating a budget during application.

1. Personnel

		Ext Cost	Direct Cost		Ind Cost	Cost Share
Personnel Totals:		**$105,000.00**	**$105,000.00**		**$0.00**	**$0.00**

Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Item Type
Personnel	Personnel	1.00	$100,000.00	$100,000.00	$100,000.00		Direct Cost
Personnel	Amendment	1.00	$5,000.00	$5,000.00	$5,000.00		Direct Cost

⊞ Add Row

ONLY FOR GRANT AMENDMENTS WITH A FINANCIAL CHANGE

5) To move funds between any budget categories, click the appropriate **Budget Category** where the funds will be moved to/from, and add/delete rows from each budget category as needed. This same process is used for reallocating funds from one approved category to another. Click the *Save Changes button* Save Changes when finished.

		Ext Cost	Direct Cost		Ind Cost	Cost Share
Personnel Totals:		**$90,000.00**	**$90,000.00**		**$0.00**	**$0.00**

Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Item Type
Personnel	Personnel	1.00	$90,000.00	$90,000.00	$90,000.00		Direct Cost

⊞ Add Row

2. Fringe Benefits

		Ext Cost	Direct Cost		Ind Cost	Cost Share
Fringe Benefits Totals:		**$30,000.00**	**$30,000.00**		**$0.00**	**$0.00**

Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Item Type
Fringe Benefits	Fringe Benefits	1.00	$30,000.00	$30,000.00	$30,000.00		Direct Cost

⊞ Add Row

6) When the funds are finalized, a budget narrative of the amendment request is required and can be provided in the **Budget Narrative** text box. The Subrecipient will detail the changes to the budget in this text box. Click the *Save Changes* `Save Changes` and *Save Narrative* buttons `Save Narrative` to save the text narrative.

a. The narrative can be exported as a PDF by clicking the *Adobe document icon* 🖹.

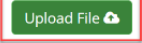7) Once the **Financial Information** is fully entered, click the *Continue button* `Continue`.

FOR ALL GRANT AMENDMENTS

8) The last page is the **Attach Files** page. The Subrecipient can upload files regarding the Grant Amendment by clicking the *Upload File button* `Upload File ☁`.

9) The **Amendment Narrative*** is a required field for the Subrecipient to provide the Grant Amendment request's purpose along with details supporting their request. If a programmatic Grant Amendment is required, the Subrecipient may complete the relevant information and upload the appropriate files.
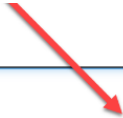
When all fields are completed, click the *Submit Amendment button* Submit Amendment .

Amendment Narrative:*
You can include a narrative below with any extra information about the amendment.

```
</>   H1   H2   H3    B   I   U    ≔   ≔   ⊟   ⊟    %
```

Explanation for Amendment.

7973 characters remaining

Back   Save   Cancel   Submit Amendment

10) An additional window will appear. This text box is an opportunity to send an optional note to the approver. Click the *Save button* Save to submit the amendment.

Submit Amendment

Are you sure you are ready to submit this amendment? Please ensure you have all necessary budget and documentation completed before sending this amendment for grantor approval. You may enter an optional note to the approver:

5000 characters remaining.

Cancel   Save

11) The Grant Amendment will now appear as "*Pending Approval*" on the **Award Dashboard** under the **Award Amendments** section.

Award Amendments
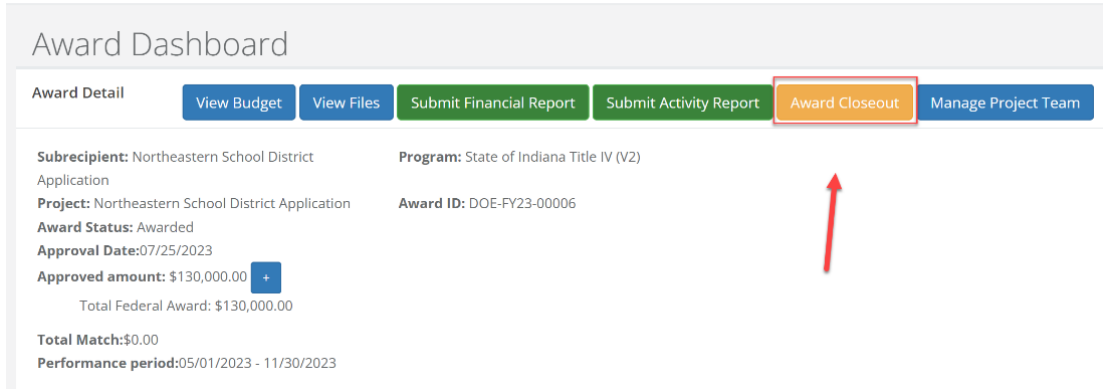
Show 10 ∨ entries   Search:

Created Date	Status	Amendment Type	Actions
07/25/2023	Approved	Subrecipient Amendment	View Amendment
07/25/2023	Pending Approval	Subrecipient Amendment	View Amendment

Showing 1 to 2 of 2 entries   Previous   1   Next

Reload

Step 7: Award Closeout

1) From the **Award Dashboard,** click the *Award Closeout button* Award Closeout .

2) The following warning message will appear. Click the *OK button* OK to proceed.

Warning!

Are you sure you want to close this grant program? If you continue the following will occur:
- You cannot submit additional project tasks or financial reports
- You cannot complete pending tasks.
- Any reports that are "Pending Approval" will be automatically rejected when the grantor approves this final financial report.
- Any unspent funds will be deobligated and returned to the grantor

If you proceed, this next process will allow you to submit your final financial report.

Cancel   OK

3) The **Award Closeout** screen will display the following information:
   a. **Award Detail**: This section displays an overview of the award being closed out.

b. **Award Financial Overview**: This section displays financial information about the award and will update as the final financial report is completed.

Award Financial Overview

This overview will update in real time as you complete your financial request. The data here reflects all submitted spending reports, even those still in the approval process.

Payments Received To Date	Advance	Reimbursement	Total Disbursed	Pending Disbursement
	$ 0.00	$ 0.00	$ 0.00	$ 25,000.00

	Spend	Match	Spend + Match
Award Total Spend to Date	$ 25,000.00	$ 0.00	$ 25,000.00
	100.00 %	0.00 %	
Award Remaining to Date	$ 105,000.00	$ 0.00	$ 105,000.00

Award Total Program Income	Received	Expended
	$ 0.00	$ 0.00

c. **Financial Report Details**: This section allows the final financial report to be filed. The process to file this report is identical to *Step 5: Submitting Financial Reports* including seeking final reimbursement for the final financial report by clicking the *Reimbursement Request* checkbox.

⚠ **Warning:** This is your final financial report. Please be sure you have completed all necessary project tasks and financial reports prior to submitting this report. Any reports that are Pending Approval will be automatically rejected when the grantor accepts this report. Any unspent funding will be unavailable to request for reimbursement after this report has been submitted.

Reporting Period: *

Category	Spend	Match	Award Approved	Match Approved	Award Remaining	Match Remaining	Total Remaining
1. Personnel	$ 0.00	$ 0.00	$ 90,000.00	$ 0.00	$ 70,000.00	$ 0.00	$ 70,000.00
2. Fringe Benefits	$ 0.00	$ 0.00	$ 30,000.00	$ 0.00	$ 25,000.00	$ 0.00	$ 25,000.00
3. Travel	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
4. Equipment	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
5. Supplies	$ 0.00	$ 0.00	$ 10,000.00	$ 0.00	$ 10,000.00	$ 0.00	$ 10,000.00
6. Contractual	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
7. Construction	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
8. Other	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00

Report Total	Spend	Match	Total Award Approved	Total Match Approved	Total Award Remaining	Total Match Remaining	Total Remaining
	$ 0.00	$ 0.00	$ 130,000.00	$ 0.00	$ 105,000.00	$ 0.00	$ 105,000.00
	0.00 %	0.00 %		0.00 %	0.00 %	0.00 %	0.00 %

Program Income	Received	Expended
	$ 0.00	$ 0.00

☐ **Reimbursement Request**

d. **Financial Report Narrative***: This section allows for a narrative at closeout.

Financial Report Narrative *

Please develop your narrative below including key metrics, spending details, and other pertinent details.

| </> | H1 | H2 | H3 | **B** | *I* | U | ≣ | ≣ | ≣ | ≣ | % |

8000 characters remaining

e. **Financial Report Files**: This section allows for files to be uploaded for closeout. Final program files can be uploaded by clicking the *Upload File button* Upload File ☁.

Financial Report Files

Please upload any files necessary For your financial report. This may include financial transactions, receipts, program income, etc...

Upload File ☁

Show 10 ⌄ entries

4) Once the above sections are completed. Click the *Submit Report button* Submit Report.

File Name	⬍	File Size	⬍	Actions	⬍
		No files are available for download			

Showing 0 to 0 of 0 entries   Previous   Next

Save & Close   Submit Report   Cancel

5) A warning screen will appear. Depending on the details of the closeout, the warning screen will display unspent funds. Click the *Ok button* Ok to start the closeout process.

Warning!

Are you sure you want to submit your financial report? This will send the contents of this form to the grantor for approval.

You have marked this as your final report. This will begin the closeout process. Any reports that are "pending approval" will be automatically rejected when the grantor approves this final financial report. There is an award remaining of $90,000.00. Since this is your final closeout report, you will be unable to utilize the remaining funding.

Cancel   Ok

6) The **Award Dashboard** will now show that the award has begun the closeout process.

Conclusion

This user guide detailed the process for Subrecipient award management and to submit required reports. For additional programmatic questions, please reach out to the Grantor Indiana State Agency.

Appendix A – eCivis Report and Award Descriptions

Grant awards, financial and activity reports, and grant amendments will have various status titles that explain their progression in the system. The table below explains each status title.

Function	Status Title	Description
Activity & Financial Reports	Pending Approval	The report has not been reviewed by the Grantor Indiana State Agency.
	Returned	The report has been returned by the Grantor Indiana State Agency for the Subrecipient to resubmit with modifications.
	Rejected	The report was rejected for reimbursement.
	Changes Requested	The report was returned to the Subrecipient for edits/changes.
	Draft	The report has been started by the Subrecipient but has not been submitted to the Grantor Indiana State Agency.
Activity Report	Approved	The activity apport has been approved.
Financial Reports	Approved/ Awaiting Payment	The financial report has been approved and the payment information is pending.
	Approved/ Paid	The financial report has been approved, payment information has been entered, and the report is fully complete.
	Paid	The financial report has been approved. No payment is requested and therefore is fully complete.
Grant Amendment	Pending Approval	The grant amendment has not been reviewed by the Grantor Indiana State Agency.
	Approved	The grant amendment has been fully approved and implemented in eCivis Grants Network/Portal.
	Rejected	The grant amendment has been rejected by the Grantor Indiana State Agency.
Grant Award	Pending Direct Award	The Applicant has accepted the direct award invitation. The Grantor Indiana State Agency needs to create and send an award recommendation package.
	Pending Acceptance	The application has been chosen for award. The Applicant must accept or deny the award in eCivis Grants Portal.
	Pending Final Approval	The Applicant has accepted the awarded and is waiting for the Grantor Indiana State Agency to finalize and approve it.
	Awarded	The Subrecipient has accepted the award. The award can now be managed in the eCivis Grants Portal.
	Under Review	The Grantor Indiana State Agency has not completed their review of the grant application.
	Closed	The Subrecipient Project has been closed.