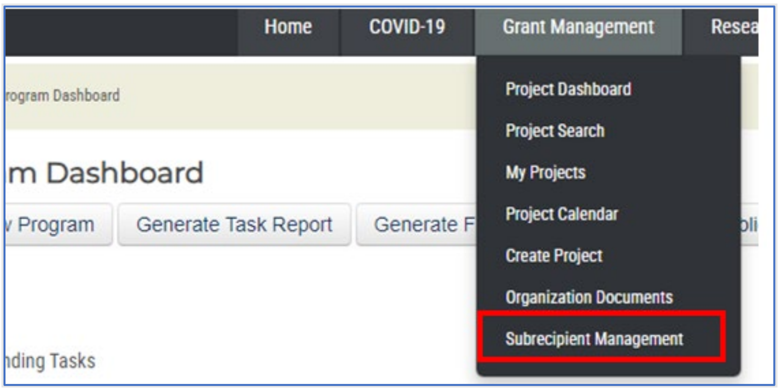
Grantor Pre-Award: 1. Creating a Solicitation

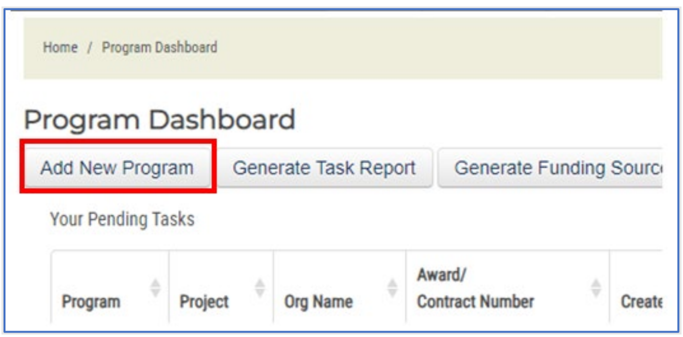
<u>Objective</u>: Grantor Agencies create a public solicitation.

<u>Summary</u>: Once the source of funding is set up in a Grantee project and made available for pass-through funding, the primary Agency eCivis user can proceed to create the Grantor solicitation.

From the eCivis Grants Network homepage, under the Grant Management tab, the Agency eCivis user will select *Subrecipient Management*. The Agency eCivis user must have a DMAH role.

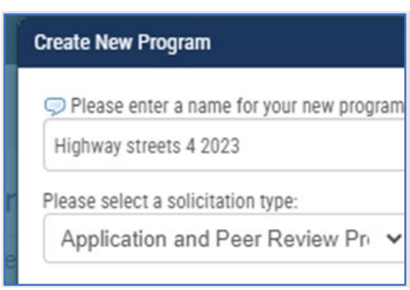


The Program Dashboard page will appear showing a complete list of all previously created solicitations. At the top of the page, the Agency eCivis user should click the *"Add New Program" button*.



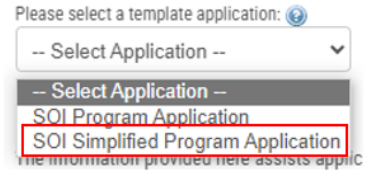
A *Create New Program window* will appear, and the Agency eCivis user will fill in the required information:

1. **Program Name**: Include the fiscal year at the end.
   Solicitation Type: Choose Direct Award Process or Application and Peer Review Process
   Department: Choose the department that will be managing the Program.

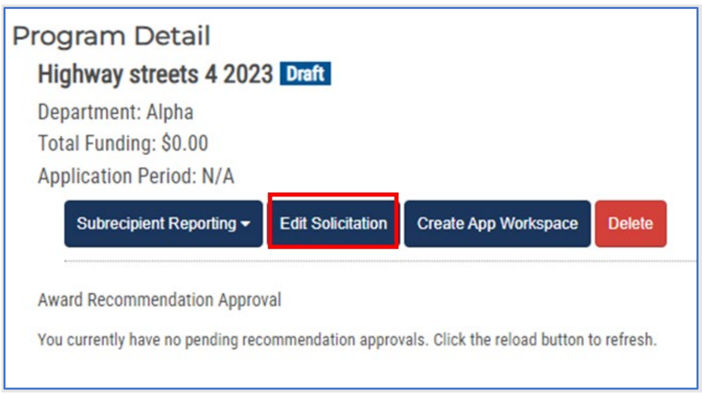


2. **Template Application**: If the Application and Peer Review Process is selected as the solicitation type, click the dropdown menu to select the *SOI Simplified Program Application* template.

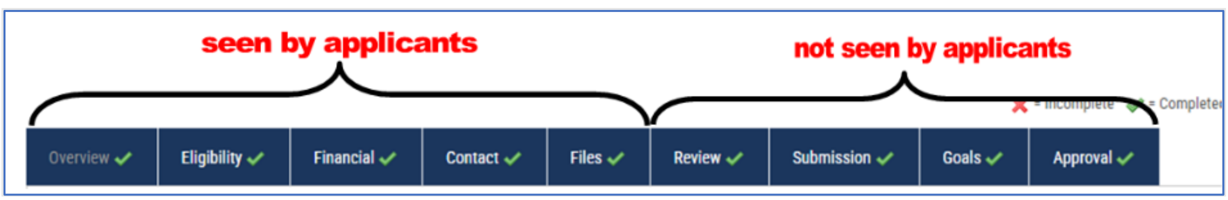
   The Agency eCivis user must select *"No"* in response to whether the solicitation is a subprogram. Click the *"Create Program" button*.



   NOTE: Private listings will not appear on eCivis' Public Solicitations Listings page, nor the [State of Indiana Grant Opportunities website](), and can only be accessed by providing your applicant a direct link to your solicitation. Once the program is created the Program Detail page will appear.



To complete each section of the solicitation you will need to click on each of the blue tabs beginning with the Overview Tab. Click on each tab, fill in data fields that pertain to the tab-topic, and click "save." Not all tabs you will fill out will be seen by applicants, see diagram below:

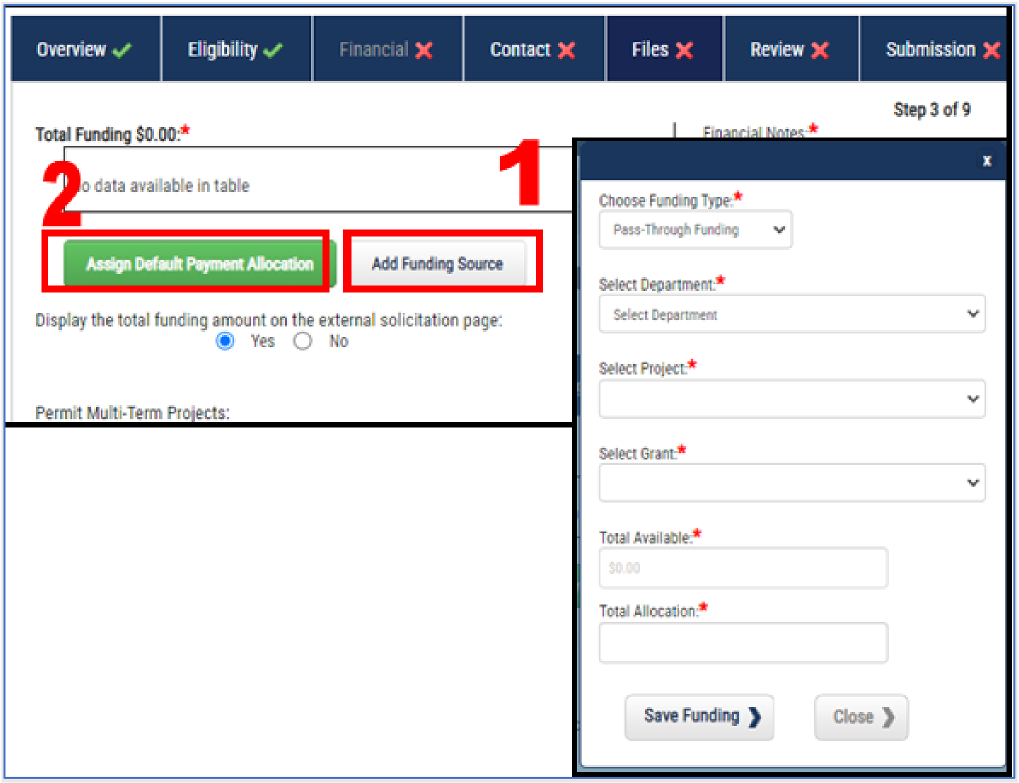


There are instances where SBA will require specific selections and they are described below:

Overview Tab: Provide narrative information regarding the purpose of the grant program. Applicants will view this on the Grant Opportunities prior to selecting the "Apply" button. In the "Summary" box, restate the date and exact time applications are accepted including time zone. Solicitations should end no later than 4 pm to align with business hours. URL link is optional. NOTE: Restate the date and exact time including time zone that applications are accepted based on the Application End Date.

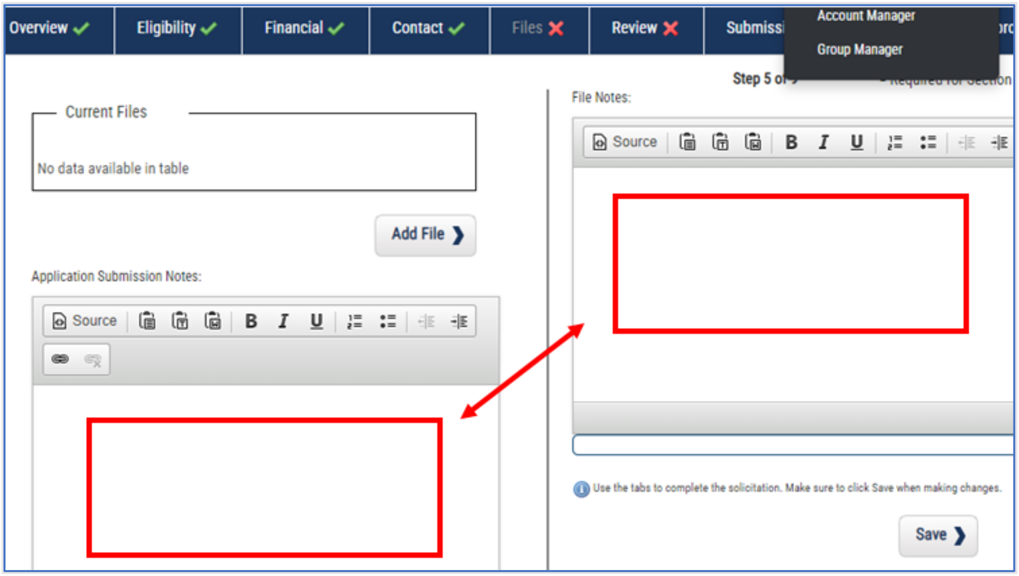
Financial Tab: The Agency eCivis user will click the "Add Funding Source" button (step 1 in the image below), Choose Funding Type from the drop-down menu, and click the dropdown menu to select either "Pass-Through Funding" or "Organizational Funding Source" which will initiate additional dropdown menus to appear.

Once all required information is entered, click the "Save Funding" button. Once the eCivis funding source(s) is added, click the "Assign Default Payment Allocation" button (step 2 below) and then enter the percentage for each default payment for each funding source(s) and click the *"Save" button*.

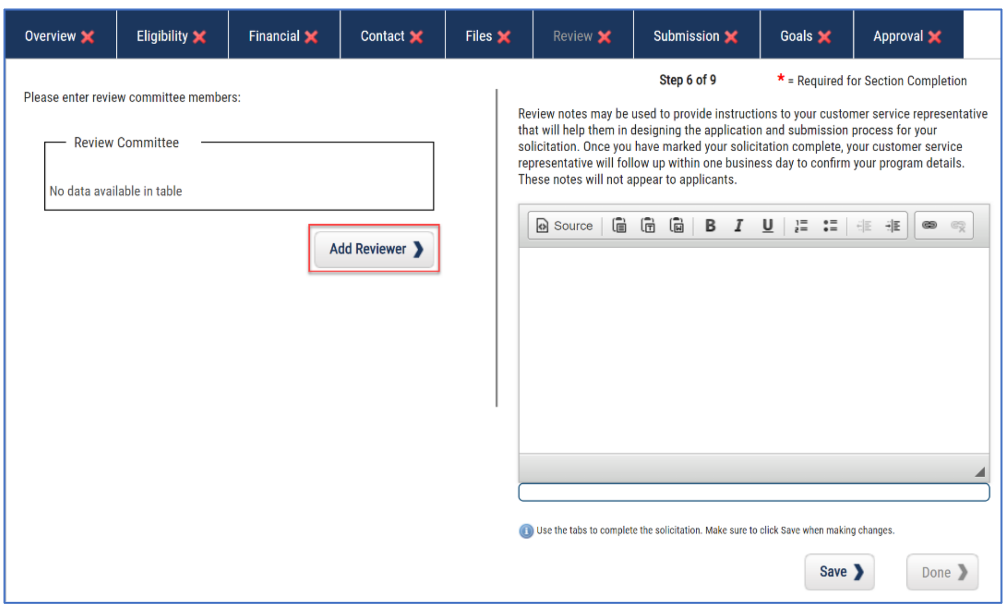


Files Tab: Upload any supplementary documents that will be needed by applicants during the application submission process. Examples include: Notice of Funding Opportunity, FAQs, Agency eCivis User Guides, Additional budget or financial spreadsheet.

NOTE: Not describing the supplemental documents and how to attach them to the task could result in subrecipients attaching them to their application incorrectly.
Full application and submission note descriptions are recommended.

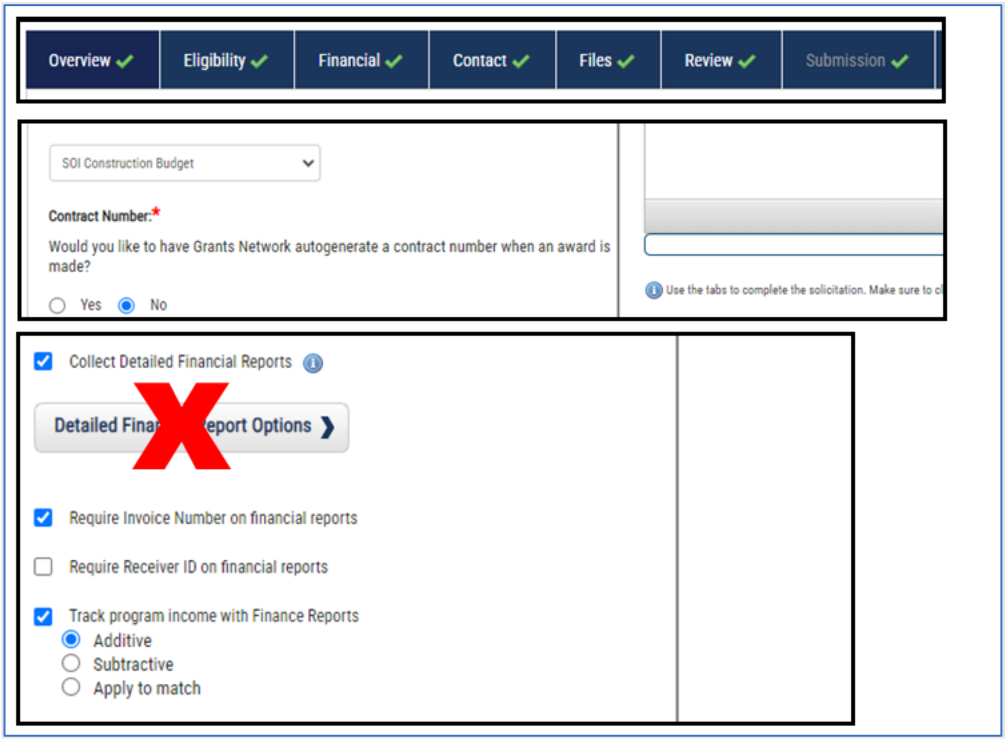


Review Tab: When designating reviewers to the committee, keep in mind the user can update this group later.



Submission Tab: When selecting a budget option from the dropdown menu only select *"SOI budgets*". This selection cannot be changed once the solicitation is published.

- *Contract Number*: select "No" to disallow the Contract Number to be autogenerated by the system so it may be entered manually by the Agency eCivis user at the Award Recommendation stage.
- *Detailed Financial Report Options*: SBA suggests *not* selecting "collect detailed financial reports".
- *Track program income with Finance Reports*, leave the default selection here.



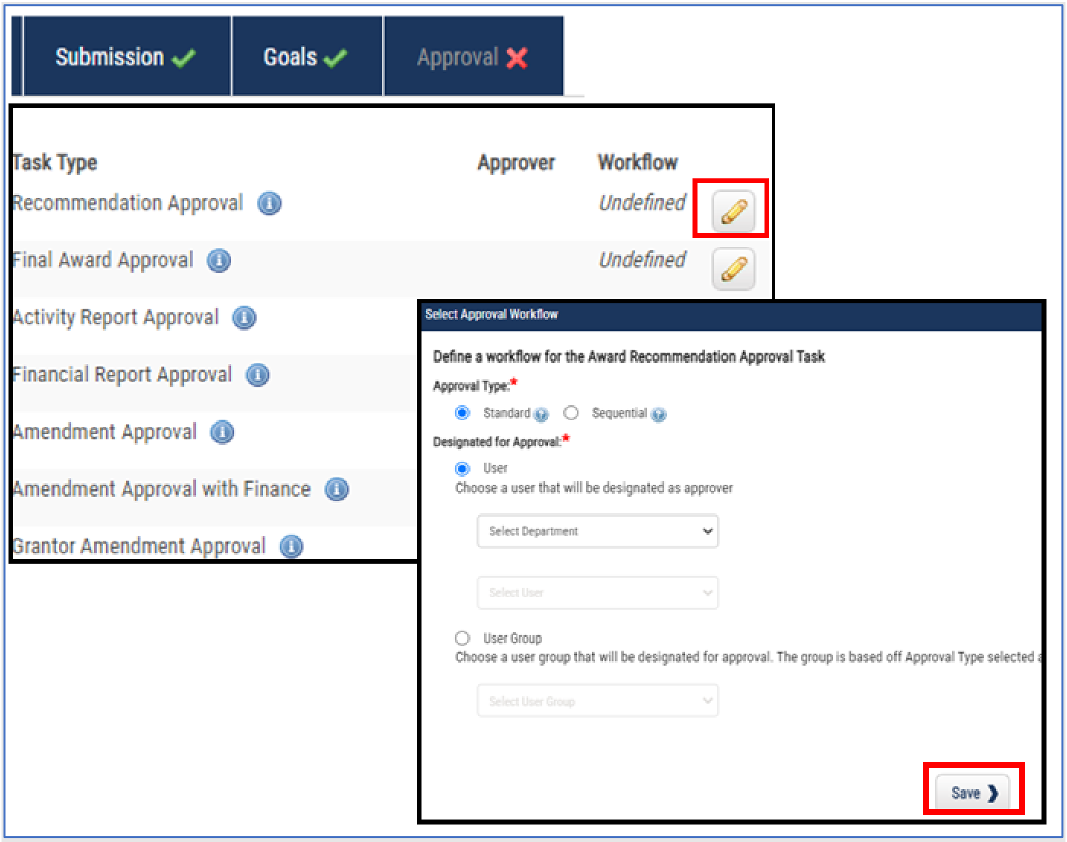
Approval Tab: Within this tab, approval workflows for the eleven tasks in the program lifecycle will be defined.

To define an approval workflow, click the *Pencil Icon* and a popup window will appear so the Agency eCivis user may select the desired criteria. Select "*yes*" for all acknowledgment statement displays.

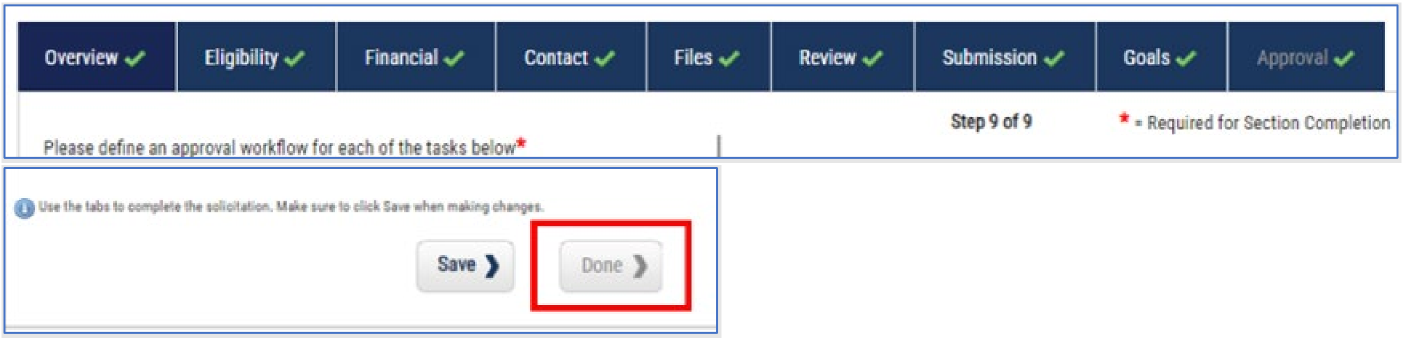
For a summary of each task, refer to the **SOI User Guide - Grantor 1. Creating a Solicitation**.

NOTE: If any of these tasks require multiple approvers, return to Step 2: Create/ Manage Approval Groups of the *SOI User Guide - Grantor 1. Creating a Solicitation* for additional guidance.

Once finished with all eleven tasks, click the "*Save*" *button*.

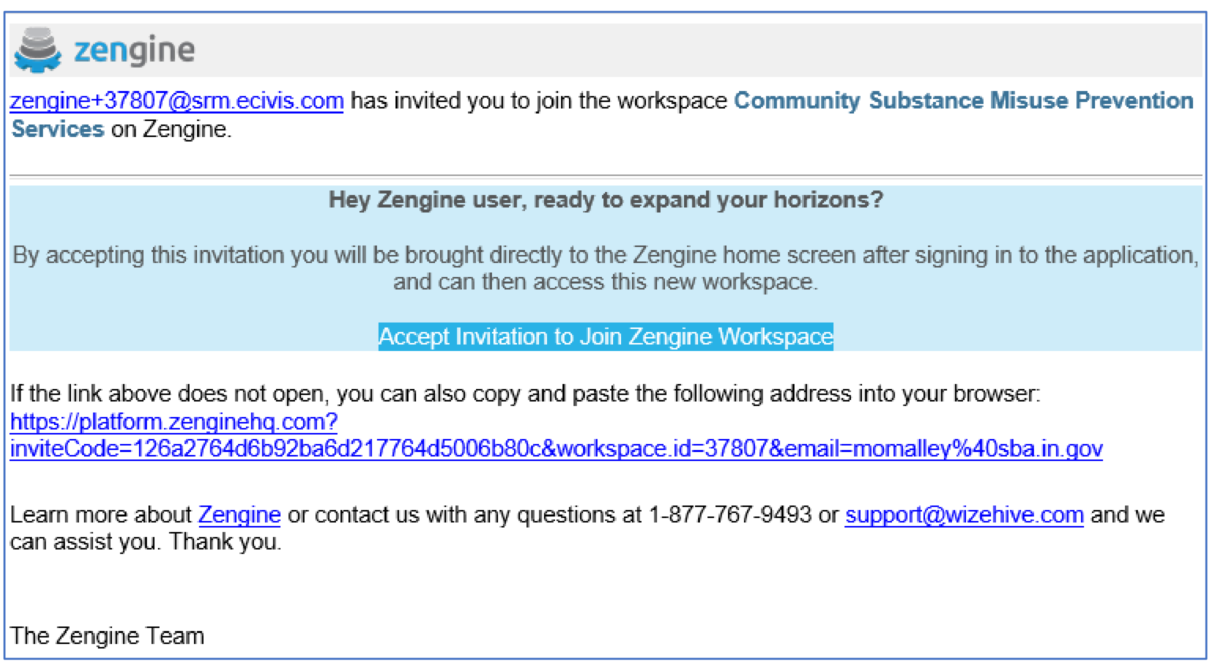

Submission
Goals
Approval
Task Type
Approver
Workflow
Recommendation Approval
Undefined
Final Award Approval
Undefined
Activity Report Approval
Financial Report Approval
Amendment Approval
Amendment Approval with Finance
Grantor Amendment Approval
Select Approval Workflow
Define a workflow for the Award Recommendation Approval Task
Approval Type:*
Standard
Sequential
Designated for Approval:*
User
Choose a user that will be designated as approver
Select Department
Select User
User Group
Choose a user group that will be designated for approval. The group is based off Approval Type selected
Select User Group
Save

Once ALL the section header tabs are marked with a green checkmark, the user can click the *"Done" button*.



You will return to the Program Dashboard page. Prior to proceeding, click on the *"Actions" button* to the right of the program name's Title and select *"Create App Workspace".* An additional pop-up window will appear. Click the *"Yes" button* to publish your solicitation.

An invitation to access the Zengine Application Workspace will be sent to the Primary Workspace email provided in the solicitation once it is ready, within approximately 24 to 48 hours.



zengine

zengine+37807@srm.ecivis.com has invited you to join the workspace **Community Substance Misuse Prevention Services** on Zengine.

Hey Zengine user, ready to expand your horizons?

By accepting this invitation you will be brought directly to the Zengine home screen after signing in to the application, and can then access this new workspace.

Accept Invitation to Join Zengine Workspace

If the link above does not open, you can also copy and paste the following address into your browser:
https://platform.zenginehq.com?inviteCode=126a2764d6b92ba6d217764d5006b80c&workspace.id=37807&email=momalley%40sba.in.gov

Learn more about Zengine or contact us with any questions at 1-877-767-9493 or support@wizehive.com and we can assist you. Thank you.

The Zengine Team