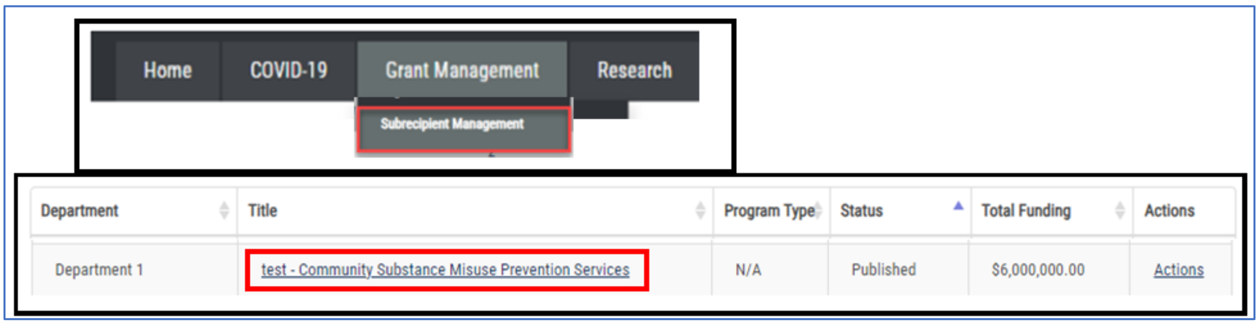
Grantor Pre-Award: 2. Application and Review Form Creation

Objective: Grantor Agencies create and edit an application for a program solicitation.

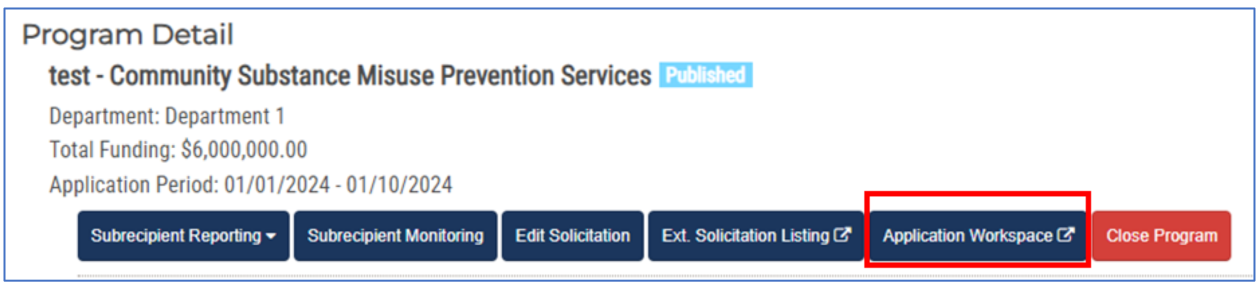
Summary: Providing instructions to agencies to help create and edit an application for a program solicitation. The solicitation budget is created during solicitation creation and cannot be edited in this section.

The Agency eCivis user serving as the Program Lead will select *"Subrecipient Management"* from the dropdown menu in the Grant Management tab.

In the Subrecipient Management page, navigate to the Program Solicitations table at the bottom of the screen. In this table, click on the appropriate title of the program solicitation to be edited.

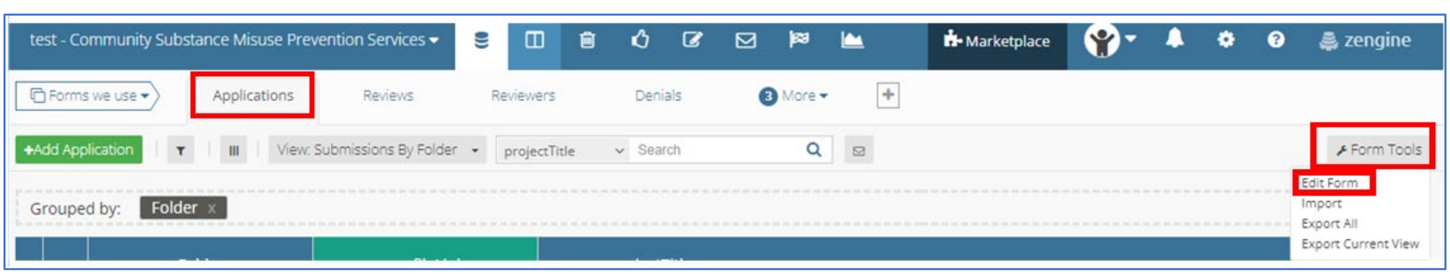


On the Program Detail page, click on the *"Application Workspace" button* to open the Application Workspace.



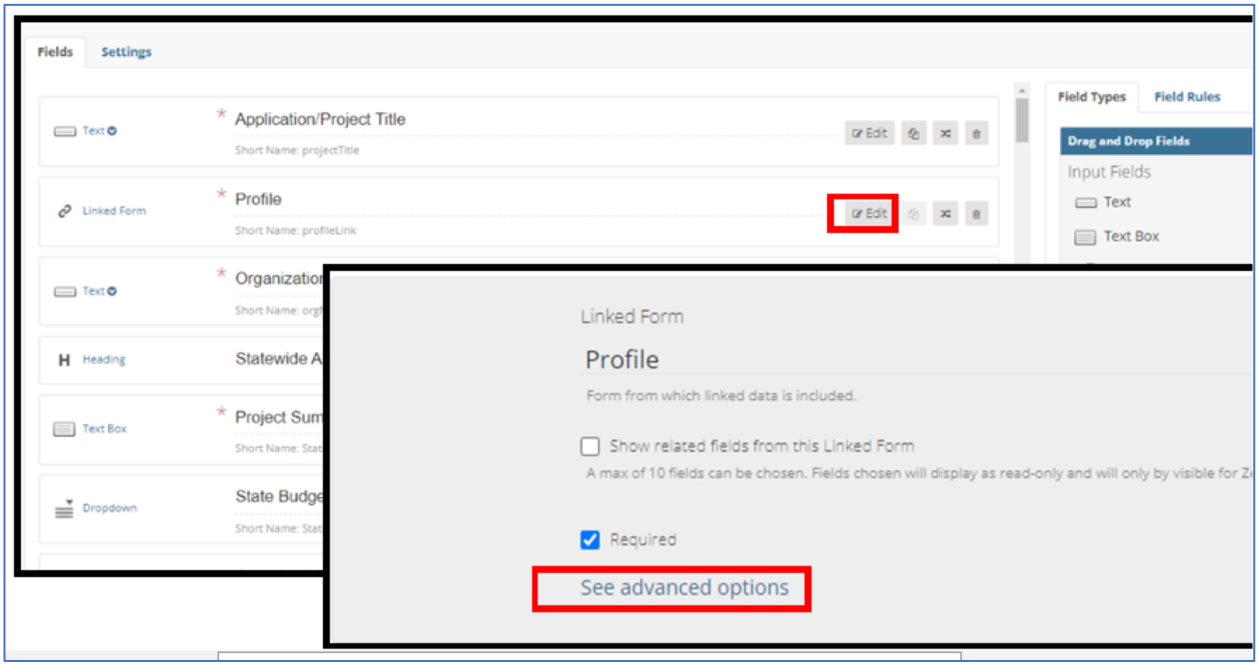
The Statewide application fields should not be edited while the Default Application fields can be tailored to best fit the program's needs. Users can customize help text and optional or mandatory file uploads.

To add help text, field restrictions, file uploads, and other fields, click "*Applications*".
On the right side of the page, click the *"Form Tools" button* and then the *"Edit Form" button*.



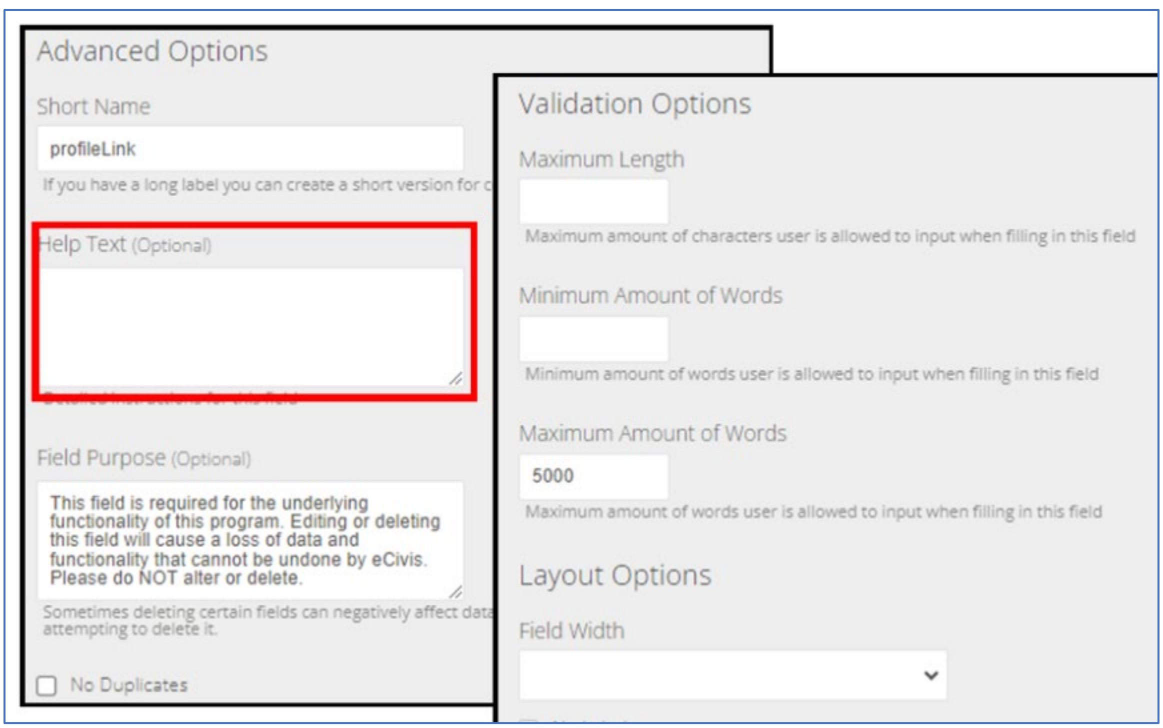
Click the *"Edit" button* for the desired field. Agency eCivis users cannot edit or remove linked Forms.

Scroll to the bottom of the selected Fields windows to click the *"See Advanced Options" link*.

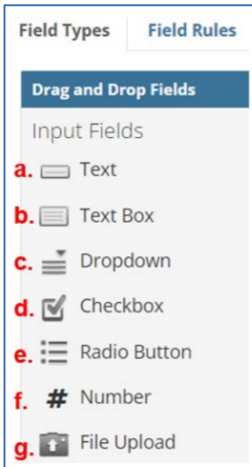


In this screen, help text can be entered in the "*Help Text" box*. Help text can provide additional text assistance to clarify fields in an application and will be viewable to the applicant after the question in a smaller font.

In the Fields following the Profile, under Validation Options, "*Text*" boxes allow the Agency eCivis user to set the "*Maximum Length*", along with "*Maximum*" and "*Minimum Amount of Words*".

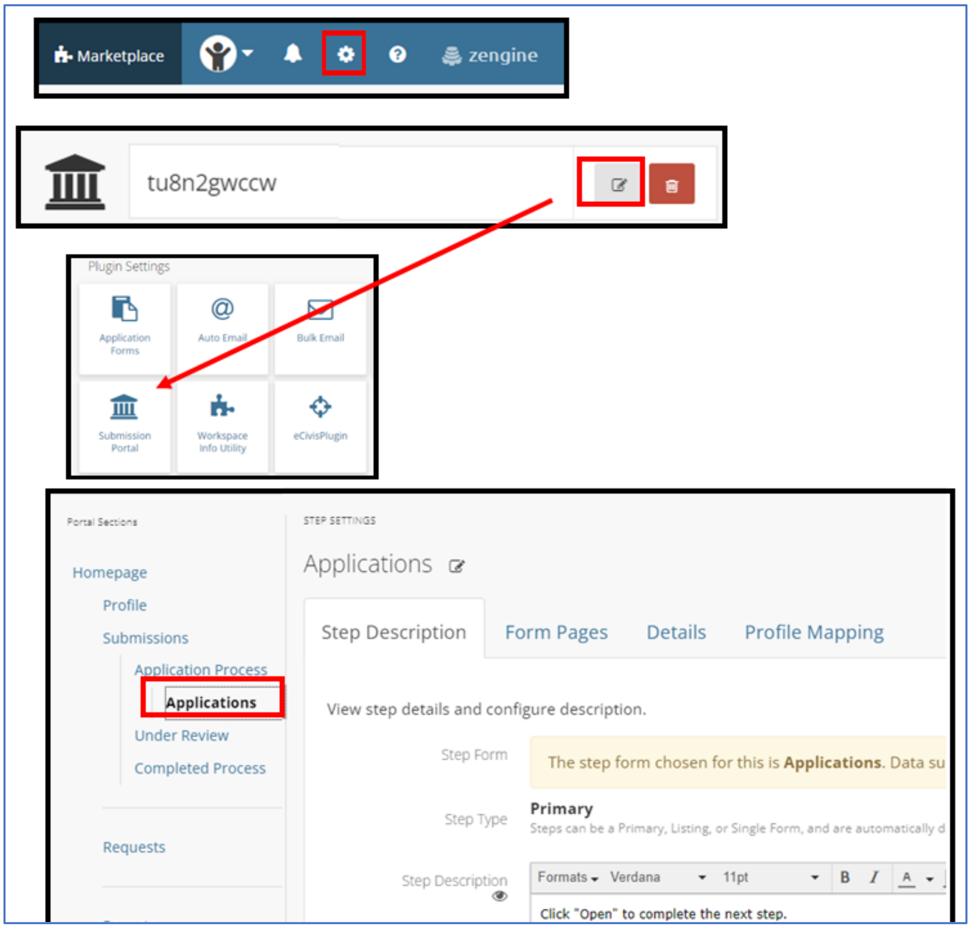


If new fields are needed, they can be added through the *"Drag and Drop" fields* pane to the left. The following fields can be added to an application:



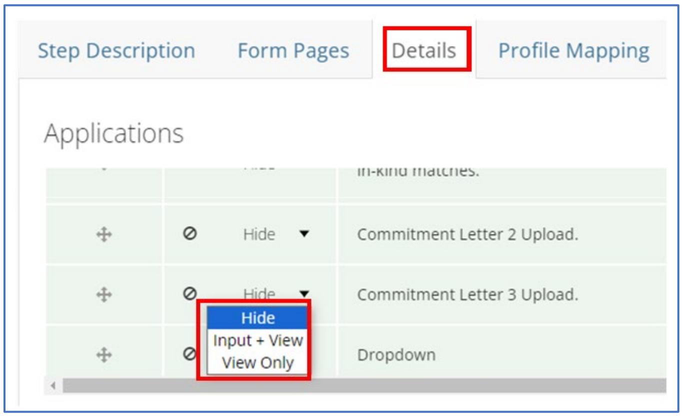
a. **Text -** allows for the input of a short amount of text.
b. **Text Box -** allows for the input of a longer amount of text.
c. **Dropdown -** allows for an Applicant to select from a pre-determined list of options presented as a dropdown.
d. **Checkbox** - Allows for an Applicant to select from a pre-determined list of options presented as a checkbox.
e. **Radio Button** - Allows for an Applicant to select from a pre-determined list of options presented as radio buttons.
f. **Number** - Allows for the input of a number with decimal places.
g. **File Upload** - Allows for an Applicant to upload documents or media. To make this field required, click the required box. Also allows for the input of a short amount of text.

To check whether fields are not hidden, the Agency eCivis user will click the *"Settings & Tools" icon*. In *"Settings & Tools",* navigate to the *"Submission Portal".* At the right of the screen, click the *Edit Submission Portal icon*, and select "*Applications*" on the tab selection to the left of the screen.



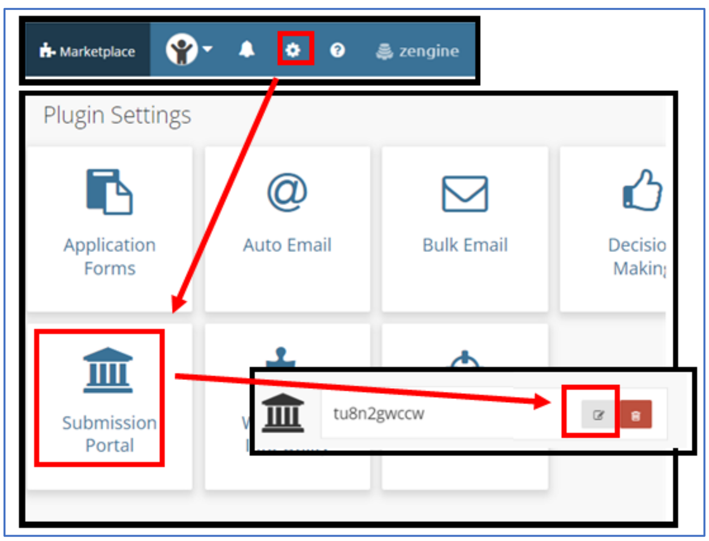
Within the Applications review screen, click on the *"Details" tab*. In this screen, each application entry will have a corresponding row, and the second column allows the view setting to be updated. For fields Applicants need to fill out, change this setting to "*Input + View*". When finished, click the *"Save all settings" button*.

NOTE: For application content, **do not delete fields**, rather select "*Hide"* for those that shouldn't be shown.



The default application due time is set to 11:59 PM (EST) on the Agency user's selected due date.
SBA recommends agencies set the application due no later than 4:00 PM on a workday.

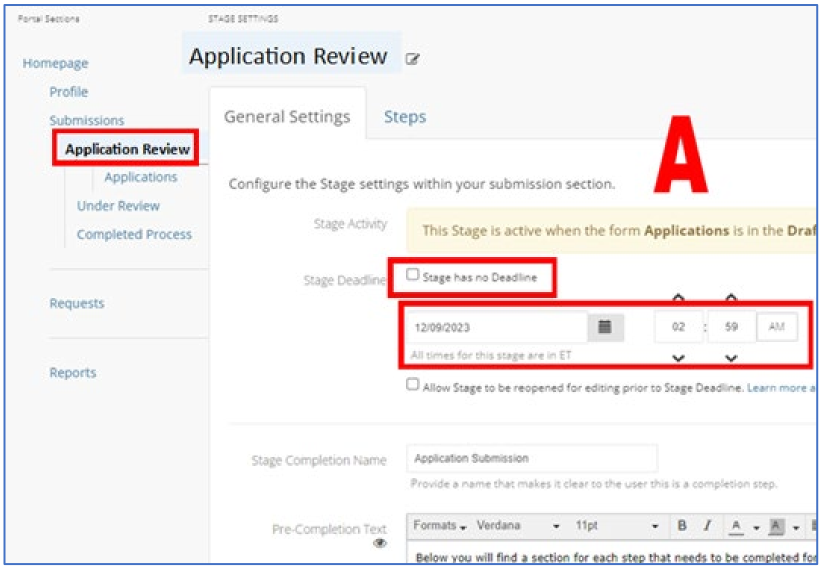
To access this feature, the Agency eCivis user can click the *Settings & Tools icon*. In the *Settings & Tools* page, navigate to the *Submission Portal*. At the right of the screen, click the *Edit Submission button*.

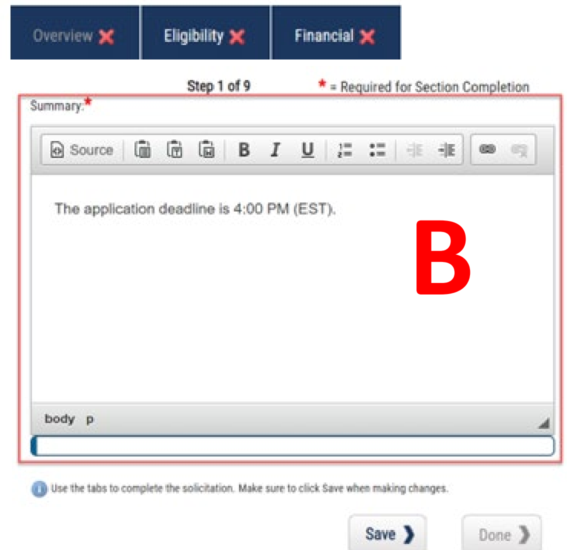


Under *Portal Sessions* on the left side of the screen, click on *"Application Review",* and

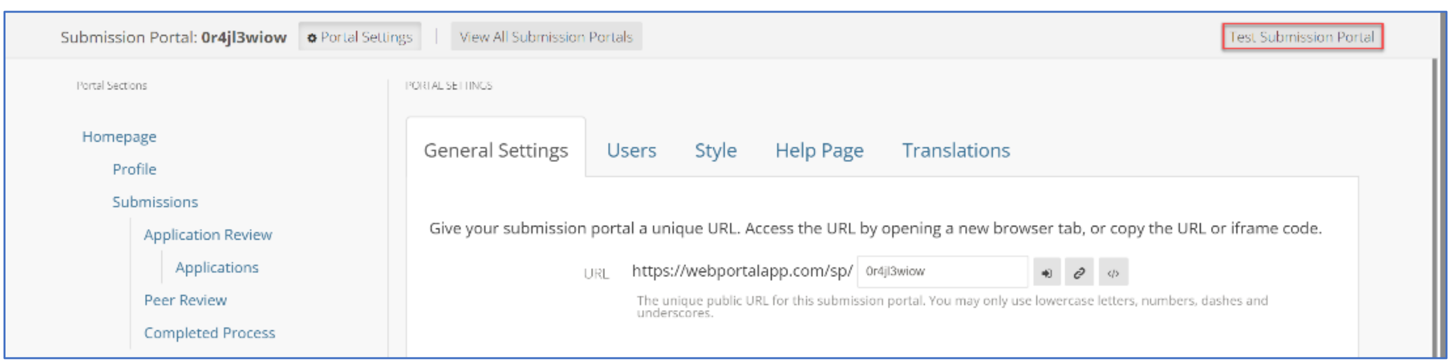
A) Uncheck the Stage Deadline checkbox to adjust to the preferred time.

B) This deadline is *not* displayed in the solicitation or application. Therefore, at a minimum, Agency eCivis users must provide the time in the original program solicitation under the *Overview tab*.





In the *Edit Submission Portal* screen, click on the *"Test Submission Portal" button* at the top right. This will allow an Agency eCivis user to view the application as if they were applying for the grant.



See **SOI User Guide - Grantor 1. Creating a Solicitation** for more information about editing a solicitation.

NOTE: To publish the solicitation and accompanying application, the Agency eCivis user will need to *reply to the original "Under Review" email sent by eCivis Support* with "Please publish by (DATE)."
The application will then be live on the requested date.

Once the solicitation and application are published, and the specified Application Start Date has passed, Applicants can begin submitting applications to the program.