

# Grantor Post-Award: 4. Managing Subrecipients

**Objective:** Grantor Agencies understand how to manage the multiple interactive tasks between subrecipient and the Indiana State agency serving as Grantor.

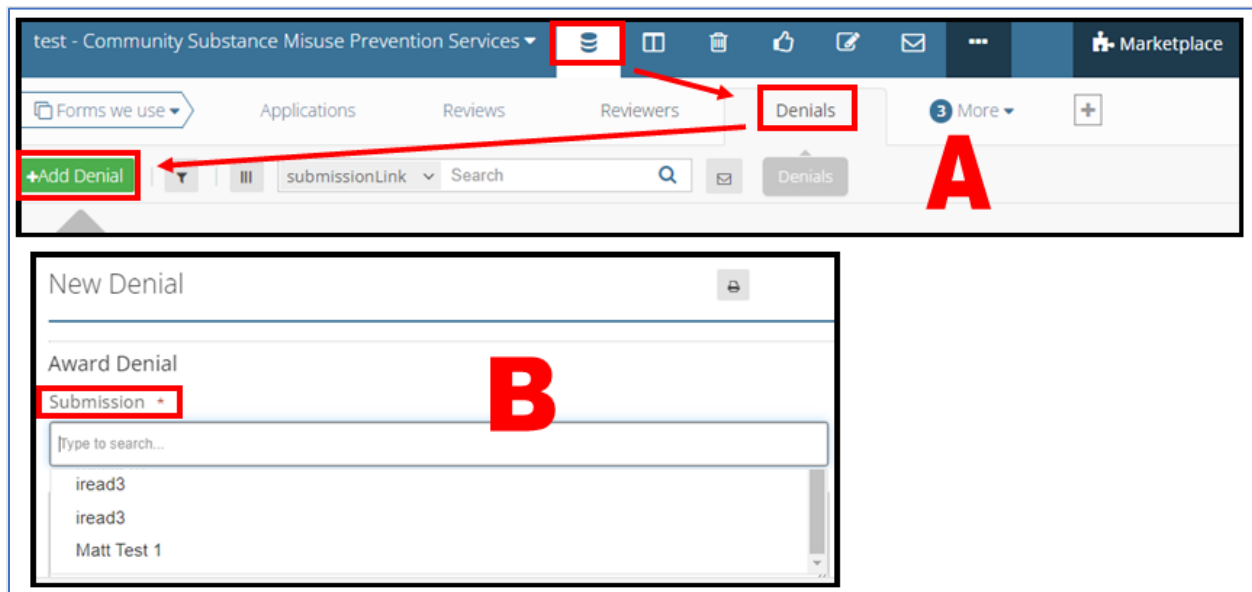
**Summary:** Instructing agencies how to finalize award decisions by creating application awards or denials and viewing and managing these awards in the eCivis Grants Network Subrecipient Management portal.

## Creating an application Denial

Once the review/scoring process is completed, and the Agency eCivis user has determined which program applications they intend to deny, the Agency eCivis user will navigate to the program's Application Workspace using the following steps.

Figure A - Click the Data icon, then on the Denials tab, and finally click the "Add Denial" button.

Figure B - Once the New Denial form appears, in the Submission dropdown menu the Agency eCivis user will select the appropriate application(s) that will be denied.



The Agency eCivis user will enter the reason for denial and click the "Save New Denial" button.

Once the application record is updated, it will appear in the *Denials* tab in the Agency eCivis user's Application Workspace, and in the Applicant's eCivis Grants Portal.

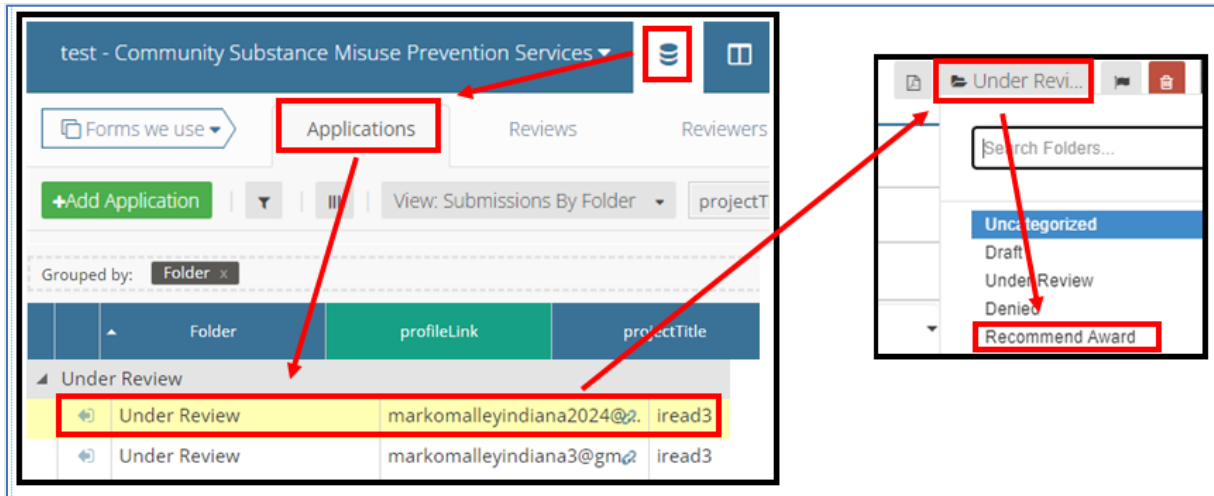
## Creating an Application Award

the Agency eCivis user will navigate to the program's Application Workspace, click the Data icon . On the Applications tab, the Agency eCivis user will select the application to be awarded, then select the Folder Icon for the application and a dropdown menu will appear. The Agency eCivis user will change the status to Recommend Award then click the Save "Applicant Name" button.

Once the application record is updated, it will appear as Recommend Award in the Agency eCivis user's Application Workspace, and "Under Review" in the Applicant's eCivis Grants Portal.

**NOTE:** This step does *not* award the applicant.

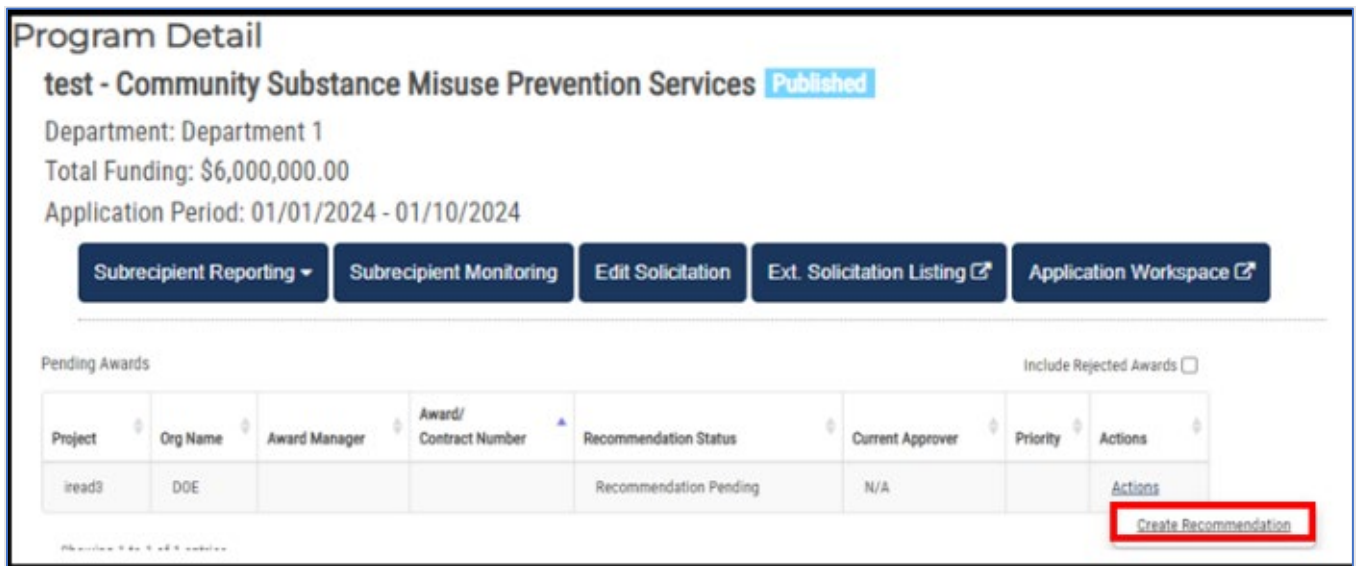
# Grantor Post-Award: 4. Managing Subrecipients



## Creating and Approving an Award Recommendation

On the Program Dashboard page, the Agency eCivis user will click the appropriate Title from the Program Solicitations table which will open the Program Detail page, and the awarded application will appear in the Pending Awards section. The Agency eCivis user will click *Actions* and then *Create Recommendation*.

When the Award Recommendation Approval Task Creation form appears, complete all fields. External notes are visible to subrecipient while internal notes are visible to the approver.



Towards the completion of filling in all fields, agency users will upload a custom-made award notification letter. This letter will be sent by eCivis to notify the applicant. Any relevant files needed by the subrecipient to finalize the award recommendation (such as signed agreements, tax forms, financial forms, and/or relevant eCivis Grants Network User Guides), may be attached before clicking the "Send for Approval" button.

# Grantor Post-Award: 4. Managing Subrecipients

The approver can now open each of the form links to review and verify:

- 1) *Award Package | Application | Budget*

Once the review of the Award Recommendation is complete, the approver will select either:

- 2) *Return For Changes* or , *Decline Award*, or
- 3) Select the *checkbox* and click the *Approve* button.

Project	Org Name	Award/ Contract Number	Award Approved	Links	Actions
Central Unified School District - Title IV	Central Unified School District	DOE-FY23-00002	\$50,000.00	<a href="#">Award Package   Application   Budget</a>	<input type="checkbox"/> <a href="#">Return For Changes</a> <a href="#">Decline Award</a>

Showing 1 to 2 of 2 entries

Reload

If the *Award* button was selected, this award package will be sent to the applicant for acceptance and the Recommendation Status will be Pending Acceptance on the Program Details page.

## Final Award Approval

If the applicant accepts their award, the Recommendation Status will update to Pending Final Approval.

- 1. This triggers the final workflow and creates a Pending Task for the first approver titled Final Award Approval.

From the Actions column, click “Review”.

Project	Org Name	Award/ Contract Number	Task Type	Reporting Period	Award Type	Invoice Number	Current Status	Submitted Date	Actions
Central School District	Central School District	DOE-FY23-00008	Final Award Approval		N/A		Final Award Approval	08/09/2023	<input type="button" value="Review"/>

The Award Approval page will appear allowing the approver to review the award details, note from the applicant, budget, and award files to verify all information is accurate and complete. Once the award is reviewed the first approver will select, *Approve*, *Return to Applicant*, or *Decline*.

Once the Final Award Approval is completed, the applicant becomes a Subrecipient and will now appear in the Subrecipient Awards section of the Program Detail page.

# Grantor Post-Award: 4. Managing Subrecipients

## Managing a Subrecipient

Click the respective title in the *Subrecipient Awards* table to navigate to the specific *Subrecipient Detail* page. Here the user can review *Award Details* and manage the subrecipient award utilizing the available features.

Project	Organization	Award Manager	Award/Contract Number	Award Type	Status	Contract Start	Contract End	Total Award
<a href="#">Remidji School Elementary District - Title IV</a>	Bemidji School Elementary District		DOE-FY23-00001	N/A	Awarded	04/16/2023	12/31/2023	\$95,000.00

Click on the *Subrecipient Monitoring* button to be taken to the Subrecipient Monitoring page within eCivis Grants Network where the financial summary provides an overview of the subrecipient award's financial status.

Subrecipient Detail

Award Detail

Subrecipient: Vendor ID: 325178 Organization Project: Award Manager: Award Status: Awarded Approval Date: 01/28/2023 - <a href="#">View Approval Workflow</a> Approved Amount: \$360,000.00 Total Federal Award: \$360,000.00 Total Other Award: \$0.00 Total Match: \$85,000.00 Performance Period: 01/01/2022 - 12/30/2024	Program: Award/Contract Number: CDBG2022-004 Subrecipient Risk: Medium Award Type: N/A
---	---

---

[Manage Subrecipient](#) [Financial Tasks](#) [Programmatic Tasks](#) [Subrecipient Monitoring](#)

---

	Advance	Reimbursement	Total Disbursed	Pending Disbursement
Total Disbursed	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

# Grantor Post-Award: 4. Managing Subrecipients

The **Award Activity** section is a record of all the miscellaneous tasks and submitted financial/activity reports associated with this award.

Figure C - The user can select the *Actions* column to *View Task* or *Change Task Owner*

Activity	Reporting Period	Submit Date	Invoice Number	Current Status	Actions
FFATA (Internal)		03/17/2023		Assigned to Task Owner	<a href="#">View Task</a> <a href="#">Change Task Owner</a>
Monitoring		05/04/2023		Draft	

There are additional options for the Agency eCivis user to select.

Figure D - The *Subrecipient Pending Tasks* section provides details on the Activity and Financial Reports for this subrecipient.

Task Type	Due Date	Actions
Financial Report Approval (Closeout)	03/30/2024	<a href="#">Actions</a>

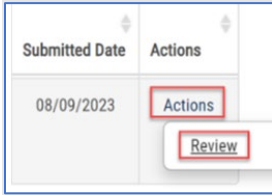
Figure E - The *Award Amendments* table is a record of all the amendments associated with the award, along with their statuses.

Amendment Date	Amendment Type	Current Status	Actions
There are no amendments for this award.			

# Grantor Post-Award: 4. Managing Subrecipients

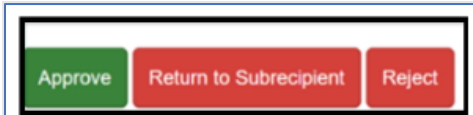
## Activity and Financial Report Reviews

After navigating to the Program dashboard and selecting the title from the Program Solicitation table, scroll through the pending task table, and select the “Action” and “Review” links.

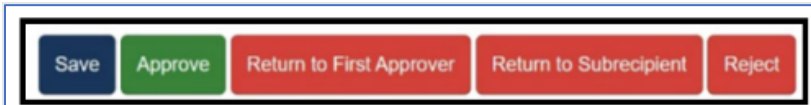


The specified report page will contain several sections for review.

The **Activity Report** will contain Subrecipient Detail, Activity Report Details, Activity Report Goals, and Activity Report Files. Once the Activity Report review is completed select *Approve*, *Return to Subrecipient*, or *Reject*.

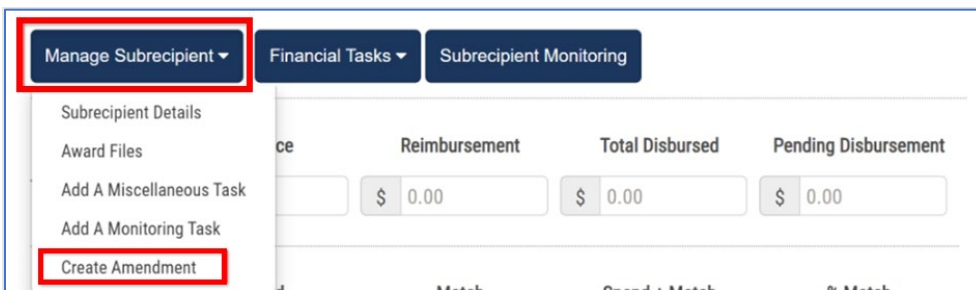


The **Financial Report** will contain Subrecipient Detail, Activity Report Details, Activity Report Goals, and Activity Report Files: Once the Financial Report review is completed, select *Approve*, *Return to First Approver*, *Return to Subrecipient*, or *Reject*.



## Initiating Grantor Amendments

The Agency eCivis user will navigate to the applicable *Subrecipient's Detail* page and click the *Manage Subrecipient* button and *Create Amendment* link from the dropdown menu.



The **Amendment page** will appear with Award Details at the top, followed by the Amendment details section. All fields on this page will be auto populated with the information input when awarded. The Agency eCivis user can begin specifying their amendment by adjusting any of the fields.

Once the Amendment is complete, select *Save Amendment*, *Send for Approval*, *Cancel*, or *Delete*.

