



Grantee Post-Award: 2. Funding Source Request Form Submission

Objective: Agencies understand the process on requesting new funding sources.

Summary: All Federal Funding Source requests will be submitted via automatic eCivis tasks to the Budget Agency. Once an Agency receives notification a grant is awarded and updates their eCivis Project to “Grant Awarded” status, the Project Lead can download the Funding Source Request Form (FSRF), fill it out, and submit.

Following **Grantee Post-Award: 1. Updating Grant Status to Grant Awarded**, there will be two tasks that will automatically generate under the Pending Tasks at the bottom of your Project Dashboard page.

- 1) Task Name: **Rqst Approval: SBA Finance- Funding Source Approval** - this task will include a blank Funding Source Request Form (FSRF). The Agency will need to upload a completed FSRF and attach the complete award, including terms of agreement, to the task to receive a Federal Funding Source for the awarded grant.
- 2) Task Name: **Rqst Approval: SBA Analyst-Agency-Allot Ctrl Approval** - this task is for the SBA budget analyst to perform the functions related to the allot ctrl process for the award and project within eCivis.

Pending Tasks	Completed Tasks	Approval History			
Task Name	Grant	Stage	Assigned To	Due	Done
 Rqst Approval: SBA Finance - Fundin...	FD9170: FY2023	Grant Awarded	M. O'Malley	09/15/2023	<input type="checkbox"/>
 Rqst Approval: SBA Analyst - DOE - ...	FD9170: FY2023	Grant Awarded	M. O'Malley	09/15/2023	<input type="checkbox"/>

NOTE: Any Agency with a state match or substate will have more pending tasks on their project dashboard as shown below. Agencies that do not have a state match or substate will not see the tasks described below:

- 3) Task Name: **Submit State Match Fund Request** (Match Agencies only) - this is a reminder to apply to an Agency’s State Match Fund in eCivis Organization Funding.
- 4) Task Name: **Create Substate Transfer Org Funding** (Substate Agencies only) - an Agency will perform a substate transfer in eCivis and the user must create Organization Funding that represents the amount of the grant they are transferring to another agency via a substate transfer. The receiving agency would then create an eCivis project from the Substate Transfer Org Funding the granting agency created. Please add the official MOU documentation to the Substate Transfer Org Funding.

Submit State Match Fund Request	FD9170: FY2023	Grant Awarded	M. O'Malley	09/15/2023	<input type="checkbox"/>	
Create Substate Transfer Org Fundin...	FD9170: FY2023	Grant Awarded	M. O'Malley	09/15/2023	<input type="checkbox"/>	
Contract Close	FD9170: FY2023	Grant Awarded	M. O'Malley	01/04/2024	11/07/2023	<input type="checkbox"/>

Completing the Tasks: Once the Agency’s tasks are assigned to the Project lead and/or re-assigned to applicable staff, to complete the task, the user will click on the Done Checkbox in the far-right column.

The first task titled- **Rqst Approval: SBA Finance – Funding Source Approval** –The Approval Request Form will appear, and the user will 1) attach filled out FSRF (see [Example A: Funding Source Request Form Snapshot](#)) and the complete award, 2) set a preferred date to receive a funding source, 3) set a reminder for SBA to create a funding source, & 4) send any notes to the SBA approver regarding the award or FSRF. See [Example B: Funding Source Request Task Form](#) for visual support in filling out the “Funding Source Approval Request Form”.

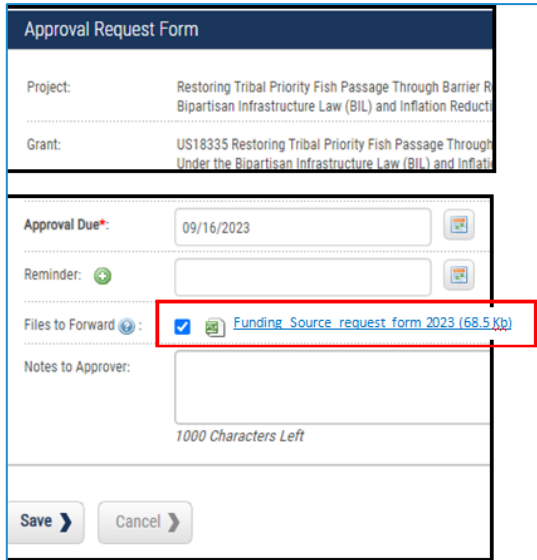
Task Name	Grant	Stage	Assigned To
 Rqst Approval: SBA Finance - Fundin...	FD9170: FY2023	Grant Awarded	M. O'Malley

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Attachments: Once the form is open, you will see the folder icon in the middle of the window. You will click on the folder to upload the FSRF. Note: We suggest users rename the file for easier identification.



Once the form has been uploaded and saved, you will see the spreadsheet hyperlink exists in between the “Reminder” line and “Notes to Approver” line. You must make sure that the box next to the excel icon is filled in with blue and a checkmark for the FSRF to be delivered with the request form upon clicking “Save”.



Approval Request Form

Project: Restoring Tribal Priority Fish Passage Through Barrier R
Bipartisan Infrastructure Law (BIL) and Inflation Reduct

Grant: US18335 Restoring Tribal Priority Fish Passage Through
Under the Bipartisan Infrastructure Law (BIL) and Inflat

Approval Due*: 09/16/2023

Reminder: [icon]

Files to Forward: Funding_Source_request_form_2023 (68.5 Kb)

Notes to Approver:
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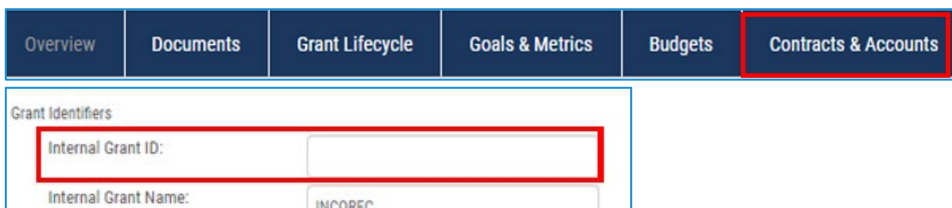
Save > Cancel >

The remaining task titled **Rqst Approval: SBA Analyst Agency- Allot Ctrl** should be completed just like the above process. Please include the Allot and Allot Ctrl Journal ID in the notes of the task.

Pending Tasks	Completed Tasks	Approval History
[icon]	Rqst Approval: SBA Finance - Fundin...	FD9170: Grant FY2023 Awarded M. O'Malley 09/15/2023
[icon]	Rqst Approval: SBA Analyst - DOE - ...	FD9170: Grant FY2023 Awarded M. O'Malley 09/15/2023

Completing these two automatic tasks will trigger the approval process with SBA and a Funding Source Number/ID will be communicated in an email titled: “Approval Response Notification”; the number will be the last line in the email.

Additionally, the SBA representative will enter the Funding Source Number/ID in the **Internal Grant ID** field within the **Contracts and Accounts** tab of the eCivis Grants Network project. The Funding Source Number is represented as Allocating BU – Funding Source – Owning BU (where BU = Business Unit).



Overview Documents Grant Lifecycle Goals & Metrics Budgets **Contracts & Accounts**

Grant Identifiers

Internal Grant ID: [red box]

Internal Grant Name: INCOREC

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Example A: Funding Source Request Form Snapshot

NEW FEDERAL FUNDING SOURCE REQUEST													
FUNDING SOURCE (assigned by SBA)	BUSINESS UNIT	FUND	TYPE	CFDA	REIMB AGR NUM (Grant #)	SBA Approval #	FEDERAL GRANTING AGENCY	GRANT DESCRIPTION	FUNDING SOURCE AMOUNT	CUST_ID	Grant Budget Period Start Date	Grant Budget Period End Date	
APPROP Bud Journal ID	Agency	Fund	Program	Department	FUNDING SOURCE (assigned by SBA)	Project	Activity	Locality	Amount	Source Type	Category	Sub Cat.	

Example B: Funding Source Request Task Form


Approval Request Form

Approval Request Form

Project: Fair Housing Assistance Program (FHAP) (Limited Eligibility) - FY 2023


Grant: US8243 Fair Housing Assistance Program (FHAP) (Limited Eligibility) - FY



Task: Rqst Approval: SBA Finance - Funding Source Approval

Attachments:  Attach the Funding Source Request Form and the Award Notification

Description: Upload award notice/agreement and Funding Source Request Form.

Approver: SBA Finance

Approval Due*:  Select the date for SBA to create a funding source

Reminder:   A reminder date for SBA to create a funding source

Files to Forward: No files are currently attached.

Notes to Approver: any notes to send to the SBA approver regarding the award and/or Funding Source Request Form.

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