

# Grantee Post-Award: 3. State Match Project & Request Submission

## **Objective:** Agencies understand the process of submitting a State Match Transfer Request.

**Summary:** All State Match Transfer List requests will be submitted via eCivis task to SBA within a specially created State Match eCivis Project. A State Match Request task, with State Match 2023 form attached, will be submitted.

Once an eCivis Project is in **Grant Awarded Stage**, two automatic tasks appear in **Pending Tasks** on the **Project Dashboard**: SBA Finance - Funding Source Approval & SBA Analyst - Agency - Allot Ctrl or State Match Request.

If the “7 - State Match Included” grants tag was selected before, or while filling out the Grant Awarded Status Form, the *following additional automatic task will appear*.

### **Task Name:** Submit State Match Fund Request

- **Description:** This is a reminder to “apply” to *SBA-created State Match Fund\** within Organization Funding.

Pending Tasks	Completed Tasks	Approval History																
<table border="1"><thead><tr><th>Task Name</th><th>Grant</th><th>Stage</th><th>Assigned To</th><th>Due</th><th>Reminder</th><th>File(s)</th><th>Done</th></tr></thead><tbody><tr><td>Submit State Match Fund Request</td><td>ORG0225: FY2024</td><td>Grant Awarded</td><td>L. Kenworthy</td><td>09/30/2023</td><td></td><td></td><td><input type="checkbox"/></td></tr></tbody></table>			Task Name	Grant	Stage	Assigned To	Due	Reminder	File(s)	Done	Submit State Match Fund Request	ORG0225: FY2024	Grant Awarded	L. Kenworthy	09/30/2023			<input type="checkbox"/>
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### **\*Agency State Match Funds in eCivis Organization Funding \*#s 1-7 below are performed by SBA eCivis users\***

SBA creates one Organization Funding entry for each State Agency.

1. **Funding Title** will be “State Match Fund”, the Agency’s name, & SFY. For example:
  - State Match Fund - IN Department of Health - SFY24
2. **Funding Type:** “State” because the match is coming from a designated State funding source.
3. **Agency** field will be the Agency name utilizing this State Match Organization funding.
  - In the example above, it would be “IN Department of Health.”
4. **Office, FAIN, Organization ID, Grant Contact,** and **CFDA** fields are not required.
5. **Total Funds** field for State Match Organization Funding will be entered as \$1,000,000,000 (\$1B).
6. **Matching Required:** “No” will be selected.
7. **Attachments** field is not required for this type of Organization Funding.

## **Creating a State Match Project**

From the Organization Funding page, agencies receiving Federal funds that call for a State Match will create a *new* eCivis project from their agency’s SBA-created Organization Funding source to fulfill their State Match.

GN Code	Funding Title	Fiscal Year	Funding Type	Total Funds	App Due	Actions
ORG0167	<a href="#">State Match Fund - IN Arts Commission - SFY24</a>	2024	Non-Competitive	\$1,000,000,000	N/A	

*select Save/Assign Grant*

**Project Title** - same naming conventions as Federal eCivis Projects but leading with “State Match”. For example:

- **Title Format:** [State Match - Charging and Fueling Infrastructure \(CFI\) Discretionary Grant Program - FFY##](#)

This eCivis project will be non-competitive and will move straight to the Grant Awarded stage.

The Agency eCivis user will select “No” for **Is an application required for this grant? \***.

In the dropdown next to **Grant Status \***, select *Grant Awarded*.

If the State Match funding will be used for pass-through, the Agency eCivis user will select “Yes” for

**Are awarded funds to be available for use as pass-through funding? \***.

There are two automatic approval tasks that must be sent to SBA:

- SBA Analyst - Allot Ctrl or State Match Request task
- SBA Finance - Funding Source Approval task

## Submitting a State Match Request within the State Match Project

Once the State Match eCivis Project has been saved at the Grant Awarded Stage, the same two auto-assigned tasks from the Federal eCivis Project will appear within Pending Tasks.

1. Both tasks will be assigned to the **Project Lead** to complete, and a checkbox appears under the **Done** column in the **Pending Tasks** section. If these tasks need to be reassigned to another **Project Team** member to complete, please see [Appendix E – Completing Pending Tasks](#).
2. To complete the task, the Agency eCivis user will click the *Done checkbox* next to the first task titled **Rqst Approval: SBA Analyst - Agency - Allot Ctrl or State Match Request**

**Task Name:** Rqst Approval: SBA Analyst - Agency - Allot Ctrl or State Match Request

- **Description:** This task serves two purposes
  - Allot Ctrl (for Federal Grants at the Awarded Stage) and
  - State Match Transfer (for State Match requests): For State Match eCivis Projects, please fill out the State Match form and reattach before sending the task to SBA.

**Upload Files:** The State Match Form is required to be uploaded before saving.

The **Approval Request Form** will appear for this task only. Enter the *Approval Due\** date and click the *Save > button* to complete the task.

- a. **Attachments:** This is only required if the award notice/agreement and/or [State Match 2023 Form](#) has not been provided previously. Upload these files by clicking the *Add Files Icon*.
- b. **Approval Due\*:** The Agency eCivis can click the *Calendar Icon* to set a preferred date to receive a funding source.
- c. **Reminder:** The Agency eCivis can click the *Calendar Icon* to set a reminder date for SBA to create a funding source.
- d. **Notes to Approver:** Use this textbox to enter any notes to send to the SBA approver regarding the award and/or Funding Source Request Form.

Returning to the **Project Dashboard** page, the remaining task titled **Rqst Approval: SBA Finance - Funding Source Approval** should be completed just like the **Rqst Approval: SBA Analyst - Agency - Allot Ctrl or State Match Request** task.

**Note:** Completing these two automatic tasks will trigger the approval process with SBA. With the completion of the **Rqst Approval: SBA Finance - Funding Source Approval** task, the SBA representative will provide the Indiana State Agency its Funding Source Number/ID for the eCivis project and grant.

The Funding Source Number/ID will be communicated to the Indiana State Agency in two ways:

- First, within an automatic eCivis Grants Network generated email indicating that the **Rqst Approval: SBA Finance - Funding Source Approval** task has been completed and approved by SBA. In that email, there is a **Notes** section where the SBA representative will enter the Funding Source Number/ID.
- 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).