State of Indiana eCivis Grants Network Post-Award User Guide

Grant Awarded through Grant Implementation
Award Management
August 2024

Contents

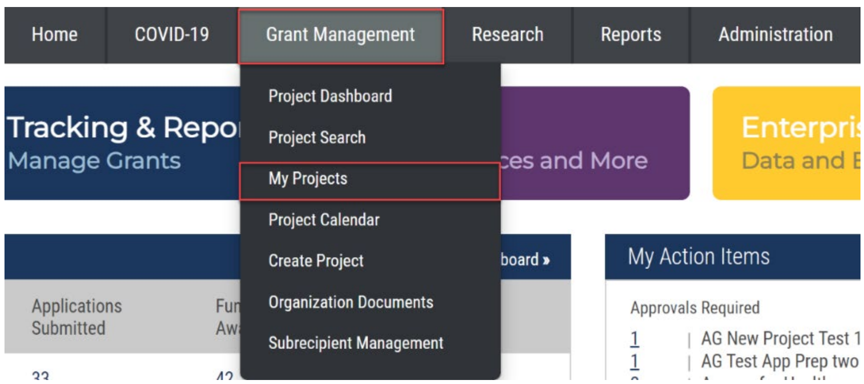
Purpose

The purpose of this user guide is to provide specific instructions to Indiana State Agencies managing awarded grants in eCivis Grants Network. These steps will allow Agency eCivis users to process award notifications and amendments, obtain Funding Source Numbers/IDs, create and complete tasks, and set approval groups.

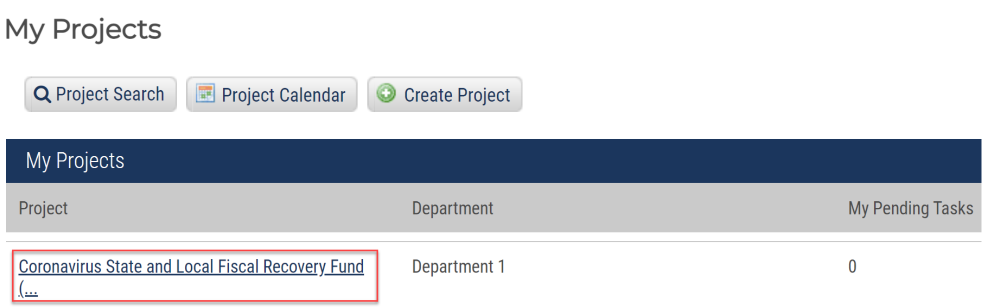
Section 1 – Updating Grant Status to Grant Not Awarded

Once the Agency eCivis user receives a notification from the funding agency/funder that the Agency was not awarded, the Agency eCivis user can update the grant status in eCivis Grants Network. The grant status must be updated using the following steps:

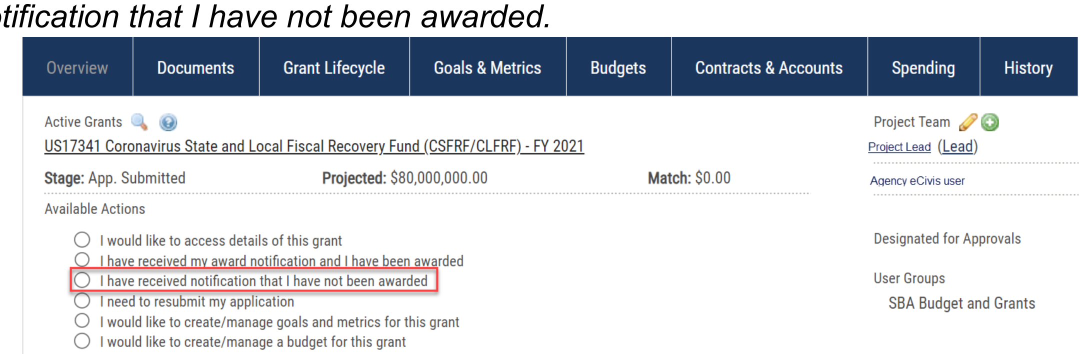
1) On the eCivis Grants Network Homepage, the Agency eCivis user will select *My Projects* from the **Grant Management** tab.



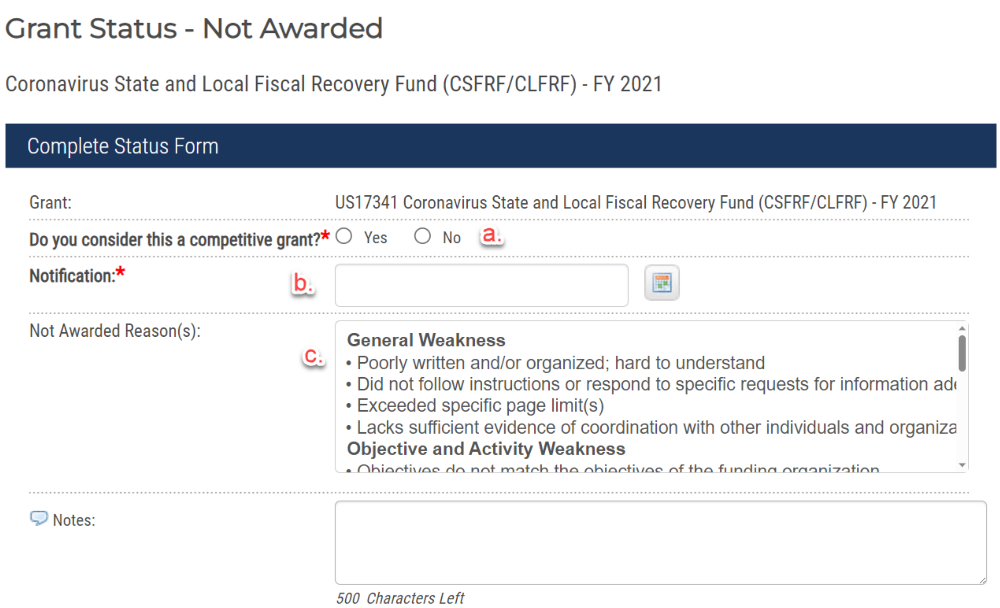
2) From the list, click the name of the eCivis Grants Network project to be updated.



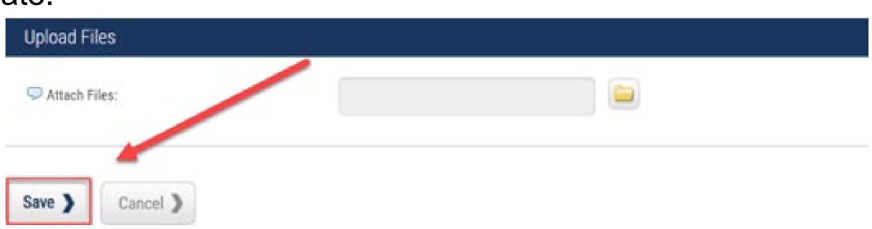
3) On the **Project Dashboard**, under the *Available Actions* list, select *I have received notification that I have not been awarded.*



4) In the **Grant Status – Not Awarded** form enter the required information indicated with an asterisk.
   a. For **Do you consider this a competitive grant?***, select:
      - *Yes* – discretionary/competitive.
      - *No* – formulaic/non-competitive.
   b. In the **Notification*** field, select the date the Indiana State Agency was informed of its non-award. If the Indiana State Agency received a communication (email, letter, etc.), the date on it should be entered.
   c. In the **Not Awarded Reason(s)**, eCivis Grants Network has provided the Indiana State Agency with common reasons for not being awarded a grant so the State of Indiana can track them if desired. An Agency eCivis user can select more than one reason by holding down the Ctrl (control) key Ctrl on the keyboard. Lastly, there are **Notes** and **Attach Files** fields that can be used to provide further information about the non-award notification. If the Agency eCivis user would like to **Attach Files**, please see step 4(c) of *Section 2 – Updating Grant Status to Awarded* for the process.



5) Once all information is provided click the *Save > button* Save to complete the grant status update.

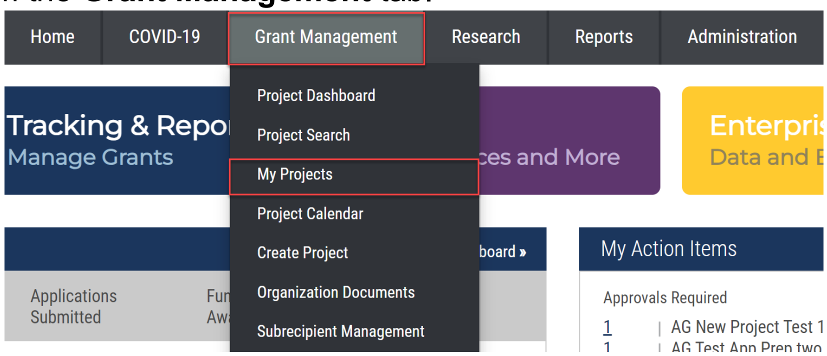


Section 2 – Updating Grant Status to Grant Awarded

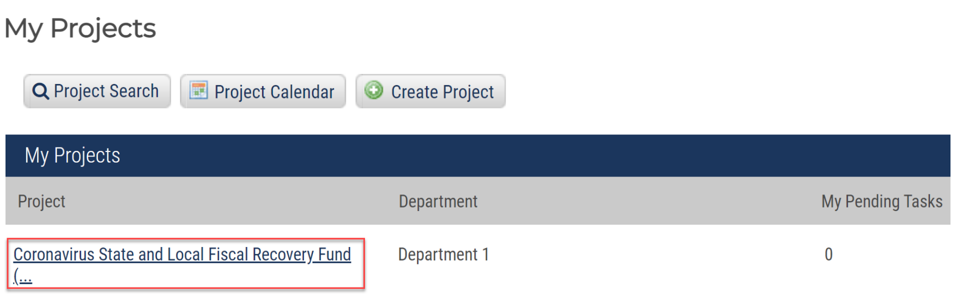
Once the Indiana State Agency has received its official award notification from the funder, the Agency eCivis user will update the grant status in eCivis Grants Network to **Grant Awarded Stage** and upload the award notice/agreement and the Funding Source Request Form. For additional support, see *Appendix A – Grant Awarded* for a table of the required eCivis Grants Network fields and the information to be entered at **Grant Awarded Stage**. If the Indiana State Agency was not awarded, return to *Section 1 - Updating Grant Status to Grant Not Awarded*.

The grant status must be updated using the following steps:

1) On the eCivis Grants Network Homepage, the Agency eCivis user will select *My Projects* from the **Grant Management** tab.



2) From the list, click the name of the eCivis Grants Network project to be updated. In the below example, the Agency eCivis user selects the Coronavirus State and Local Fiscal Recovery Fund.

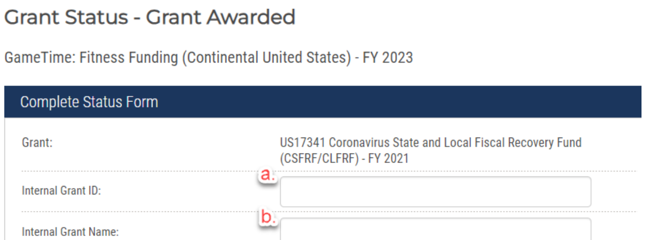


3) On the **Project Dashboard** page under the **Available Actions** list, select *I have received my award notification and I have been awarded.*

4) In the **Grant Status – Grant Awarded** form, enter the required information indicated with an asterisk or as stated below.

a. **Internal Grant ID** is reserved for SBA usage. Leave this field blank.

b. **Internal Grant Name** is reserved for SBA usage. Leave this field blank.


Grant Status - Grant Awarded

GameTime: Fitness Funding (Continental United States) - FY 2023

Complete Status Form

Grant: US17341 Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021

Internal Grant ID: a.

Internal Grant Name: b.

c. The Agency user will need to answer **Do you consider this a competitive grant*?** by clicking on the appropriate radio button:

- *Yes* – discretionary/competitive.
- *No* – formulaic/non-competitive.

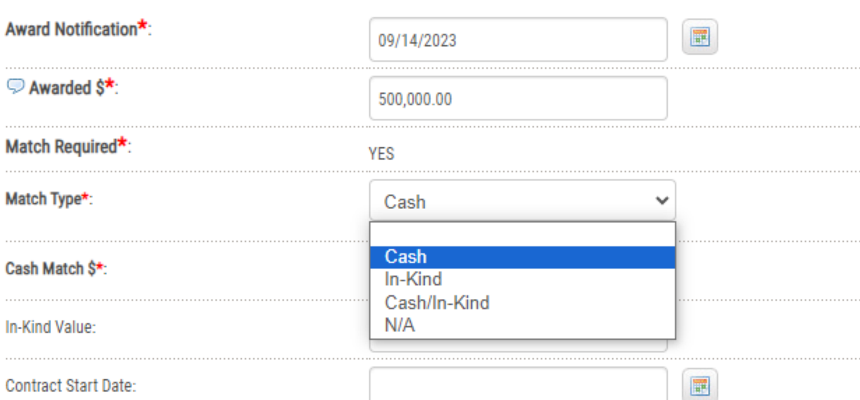

Do you consider this a competitive grant? *: c. Yes No

d. **Award Notification*** is a date field, the Agency eCivis user will click the *Calendar Icon* and populate the award date indicated on the award notice. If a federal cooperative agreement or federal contract, the Agency eCivis user should enter the date of the last signature on the agreement.

e. **Awarded $*** will default to the amount entered at **Application Submitted** for **Projected Award $**. The Agency eCivis user should only update the amount if different on the award notice.

f. **Match Required*,** like **Awarded $,** defaults to the responses made at **Application Submitted**. If there are any changes based on the award notice, the Agency eCivis user should update those fields accordingly.

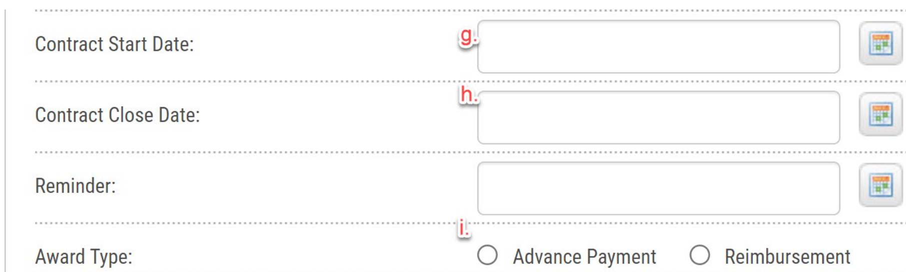
- If *Yes*, **Match Type*** will be required and the Agency eCivis user will need indicate the **Match Type*** as either *Cash*, *In-Kind*, or *Cash/In-Kind*.
- Given the **Match Type*** response, either **Cash Match $*, In-Kind Value***, or both will be required and will need a value entered by the Agency eCivis user.


Award Notification*:	09/14/2023
Awarded $*:	500,000.00
Match Required*:	YES
Match Type*:	Cash (Cash / In-Kind / Cash/In-Kind / N/A)
Cash Match $*:	
In-Kind Value:	
Contract Start Date:	

g. The **Contract Start Date** and the **Contract Start Date** are the budget period. For the **Contract Start Date,** the Agency eCivis user will use the *Calendar Icon* to enter the first date stated for the budget period on the award notice or within the agreement. If only a period of performance/performance period or project period is provided, use that as the **Contract Start Date**.

h. For the **Contract Close Date,** the Agency eCivis user will enter the last date of the stated budget period.
   - An Agency eCivis user can also create a **Reminder** for the **Contract Close Date** in order to receive notifications and remain aware of the end date for allowable costs to be charged to the project.

i. The **Award Type** is required by SBA. The Agency eCivis user will select either:
   - *Advance Payment* – lump sum payment by the funder has been made to the Agency.
   - *Reimbursement* – the Agency must incur expenses first, then draw down their reimbursement from the funder.



j. The **UEI** field is required by SBA. The Agency eCivis user will enter the Unique Entity Identifier (UEI) in the **UEI** field that the Agency used to apply for this grant and appears on its award notice, if applicable.

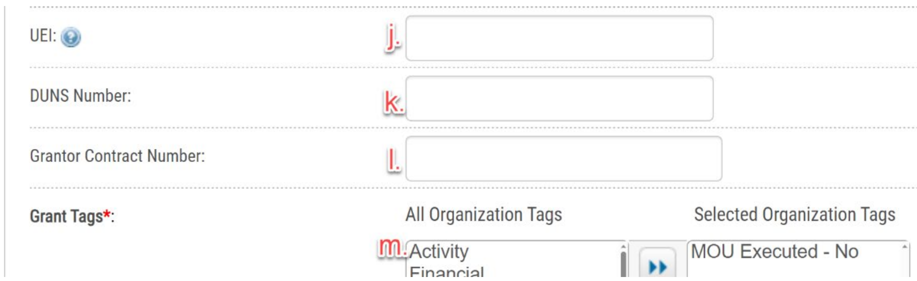
k. The DUNS Number is not required by either eCivis Grants Network or SBA.

l. For the **Grantor Contract Number**, the Agency eCivis user will enter the unique award number associated with the Agency's award such as the FAIN or Federal Award Identification Number, Grant Award/Grant Award Number, agreement number, etc., as stated on the award notice or within the agreement.

m. **Grant Tags*** will default to the entries made in the **Application Submitted Stage**. The Agency eCivis user should review and update as appropriate. To update, select the applicable grants tag under *All Organization Tags* and move it to the *Selected Organization Tags* with the single right arrow.

   Note: If the eCivis project has a state match requirement or the grantee has a State Agency-to-State Agency/Substate transfer, the Agency eCivis user must select the "7 - State Match Included" or the "4 - MOU Substate Transfer - UPLOAD FORM or MOU." These tags will auto-generate tasks needed in the awarded stage.

n. **Notes** field is not required but if there is any new information related to earlier **Notes** provided to SBA, then the Agency eCivis user will enter the update here, e.g., Project Period, estimated funding total.

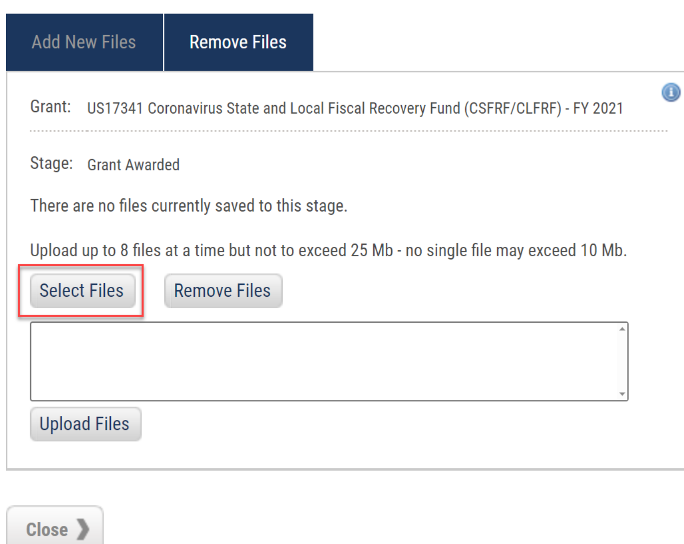


o. **Allocation Option** section

- **Are awarded funds to be available for use as pass-through funding?*** Only click the *Yes* radio button if funding is used for pass-through. If yes, enter the dollar **Amount to earmark for pass-through funding***.
  - ➢ **Amount to earmark for pass-through funding*** will be defaulted to the amount entered for **Awarded $***.
- Always leave the answer *No* for **Are awarded funds to be available for Allocation to sub-projects?***.

p. Using **Attach Files***, the Agency eCivis user will be required to upload the award notice/agreement. Additionally, the Agency eCivis user will need to upload the Funding Source Request Form (this form will also be added to the **Rqst Approval: 2- SBA Finance - FS (Funding Source)** task described in *Section 3 – Automatically Assigned Tasks (Funding Source)*.

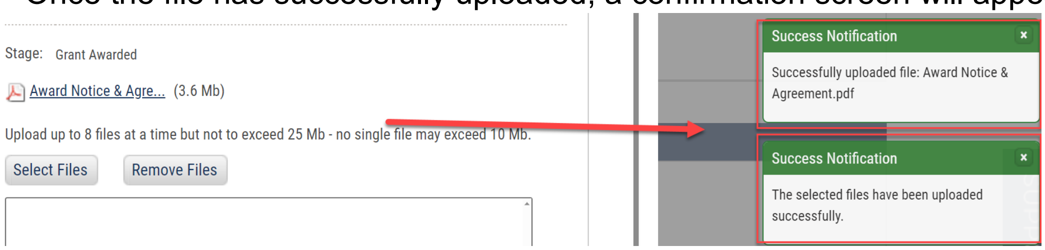
- To upload files, click on the *Manage Files Icon* . This will open the **Upload Files** screen.



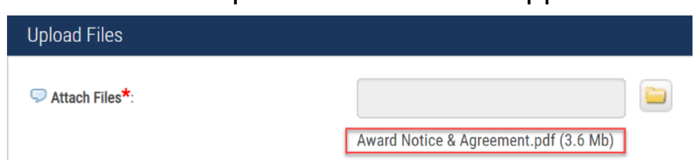
- In this screen, click on the *Select Files button* Select Files. This will open the file browser on the Agency eCivis user's computer where they will navigate and select a document to upload.

- The file should now appear in the box above the *Upload Files button* Upload Files. Click the *Upload Files button* Upload Files to upload the file to eCivis Grants Network. A loading bar will appear once the upload process begins.

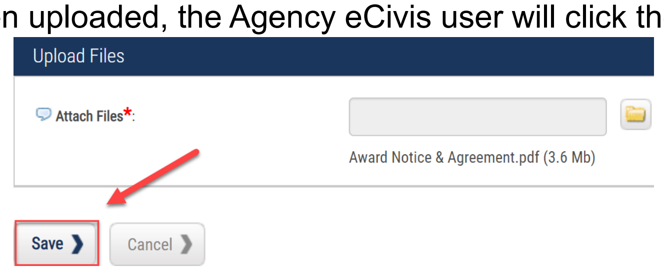
- Once the file has successfully uploaded, a confirmation screen will appear.



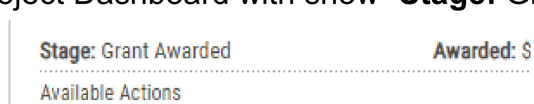
- Click the *Close > button* Close ❯ and the uploaded file should appear in the **Upload Files** section.



5) Once the **Grant Status – Grant Awarded** form is completed and required documents have been uploaded, the Agency eCivis user will click the *Save > button* Save ❯.



- If the eCivis project has successfully been updated to the **Grant Awarded Stage**, the Project Dashboard with show "**Stage:** Grant Awarded".



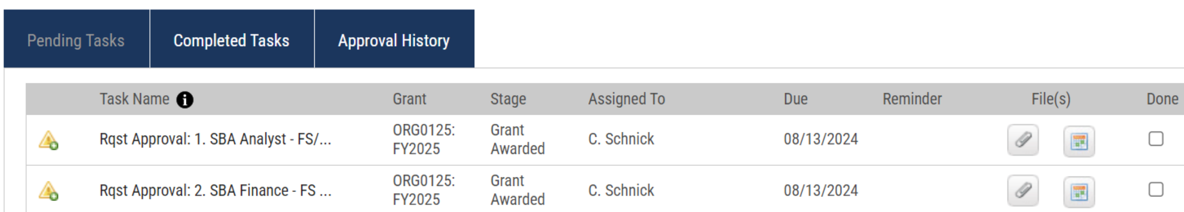
Section 3 – Automatically Assigned Tasks (Funding Source)

1) Once the Agency eCivis user has updated the project and grant to **Grant Awarded Stage,** two automatic tasks will appear on the **Project Dashboard** in the **Pending Tasks** section. If the “7 - State Match Included” grants tag or the “4 - MOU Substate Transfer - UPLOAD FORM or MOU” grants tag was selected before or while filling out the Grant Awarded Status Form, additional automatic tasks will appear.

   a. **Task Name**: Rqst Approval: 1- SBA Analyst - FS/Match/Subgrant - [Agency Acronym]
      - **Description**: This task serves three purposes at the Grant Awarded stage:
        - Federal Funding Source (FS): SBA Analyst reviews & approves.
        - State Match: attach a completed State Match Request form.
        - Substate Transfer: attach a completed Subgrant Request form.

   b. **Task Name**: Rqst Approval: 2- SBA Finance - FS (Funding Source)
      - **Description**: This task serves three purposes at the Grant Awarded stage:
        - Federal Funding Source: attach the following to this task: a completed Funding Source Request Form, the award notice/agreement, and Terms and Conditions.
        - State Match: attach a completed State Match Request form.
        - Substate Transfer: attach a completed Subgrant Request form.

      NOTE: If requesting an *Estimated* Funding Source, see Appendix F – Estimated Funding Source Guidance.

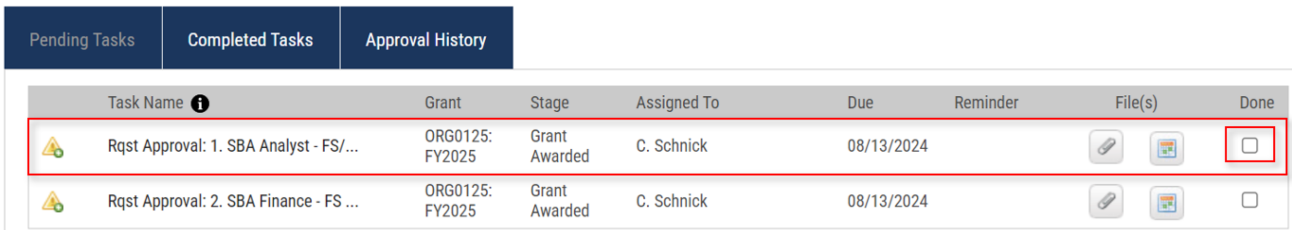


   c. **Task Name:** Submit State Match Fund Request
      - **Description:** This is a reminder to assign your agency's SBA-created State Match Fund (in Organization Funding) to a new State Match Project. See the State of Indiana eCivis Grants Network User Guide: Grantee Post-Award Management for guidance on creating the State Match eCivis Project.
      - For more information, review *Section 5 – Submit State Match Fund Request.*

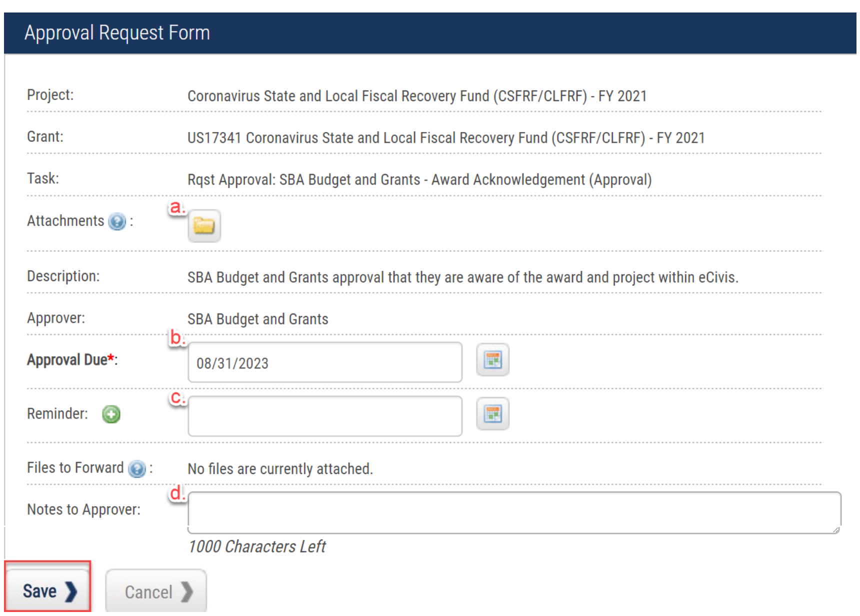
   d. **Task Name:** Create Substate Org Funding
      - **Description:** - The Granting Agency of a Substate Transfer must create Organization Funding that represents the amount of the award they are transferring to another agency/agencies. Attach executed MOU documentation. Include a note outlining the amounts available to each subgrantee.
        - The Substate Agency then creates an eCivis project from the Granting-created Substate Transfer Org Funding.
        - For more information, please review the User Guide: Grantee Post-Award Management on the SBA Grants Management Website.
        For more information, review *Section 6 – Create Substate Transfer Org Funding.*

2) Both tasks will be assigned to the **Project Lead** to complete, and a checkbox appears under the **Done** column in **Pending Tasks**. If these tasks need to be reassigned to another **Project Team** member to complete, please see *Appendix E – Completing Pending Tasks*.

3) To complete the task, the Agency eCivis user will click the *Done checkbox* next to the first task titled **Rqst Approval: 1- SBA Analyst - FS/Match/Subgrant - [Agency Acronym]**.



4) The **Approval Request Form** will appear for this task only. Enter the *Approval Due** date and click the *Save > button* Save ❯ to complete the task.
   a. **Attachments**: This is only required if the award notice/agreement and/or Funding Source Request 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.



5) Returning to the **Project Dashboard** page, the remaining task titled **Rqst Approval: 2- SBA Finance - FS (Funding Source)** should be completed just like the **Rqst Approval: 1- SBA Analyst - FS/Match/Subgrant - [Agency Acronym]** task.

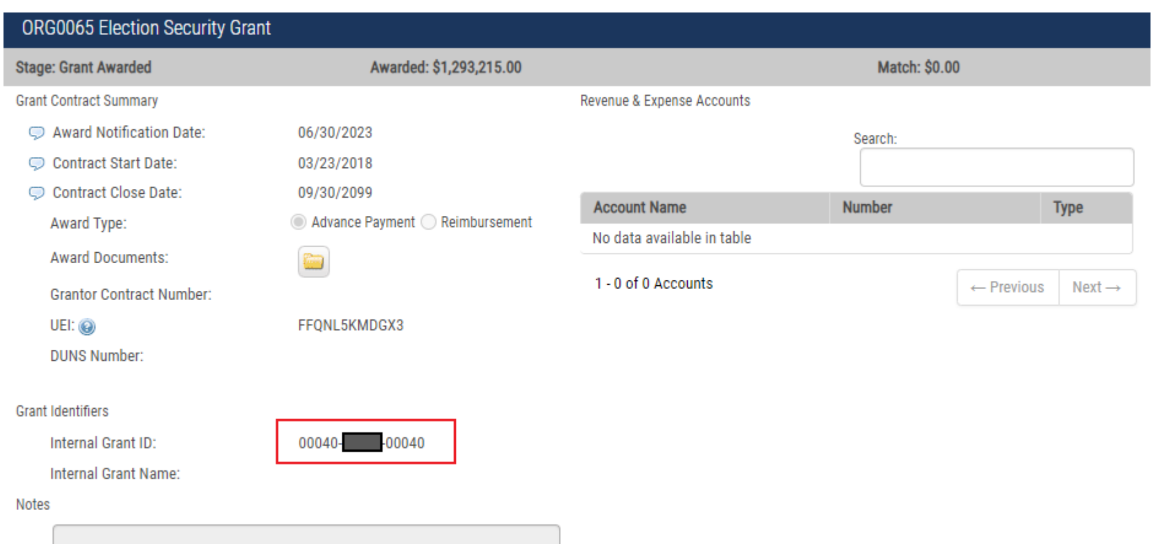
6) Completing these two automatic tasks will trigger the approval process with SBA. With the completion of the **Rqst Approval: 2- SBA Finance - FS (Funding Source)** task, the SBA representative will provide the Indiana State Agency its Funding Source Number/ID for the eCivis project and grant.
   a. 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: 2- SBA Finance - FS (Funding Source)** 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.

Grants Network - Approval Response Notification Thursday, August 3, 2023

The following item has been submitted in response to a request for approval:

Department: Department 1
Project: Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021
Grant: US17341 Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021
Project Lead: Project Lead
(317) 232-5610
agencyecivisuser@sba.IN.gov
Approver: SBA
Task: Approval Reqd: SBA Finance - Funding Source Approval
Approval Response: Approved
Notes: Funding Source Number: 019999

      - 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). See *Appendix G – State of Indiana Agencies, Acronyms, and BUs*.



ORG0065 Election Security Grant

Stage: Grant Awarded Awarded: $1,293,215.00 Match: $0.00

Grant Contract Summary

Award Notification Date: 06/30/2023
Contract Start Date: 03/23/2018
Contract Close Date: 09/30/2099
Award Type: Advance Payment Reimbursement
Award Documents:
Grantor Contract Number:
UEI: FFQNL5KMDGX3
DUNS Number:

Grant Identifiers

Internal Grant ID: 00040-[redacted]-00040
Internal Grant Name:

Notes

Revenue & Expense Accounts

Search:

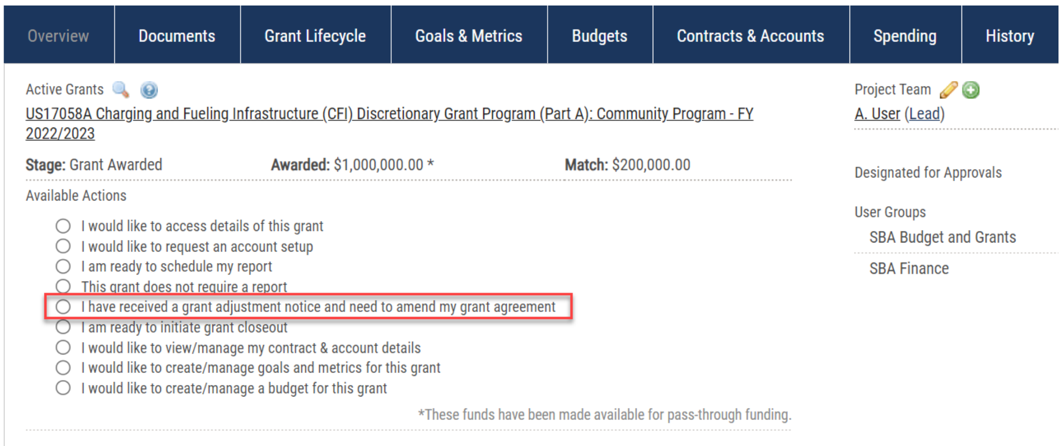
Account Name	Number	Type
No data available in table		

1 - 0 of 0 Accounts ← Previous Next →

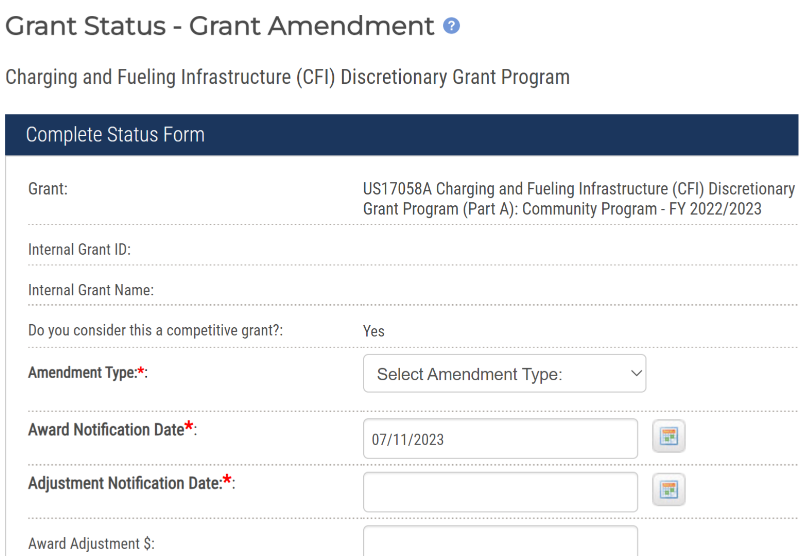
Section 4 – Award Adjustment/Award Amendment

If an amendment/modification is issued for the project and grant, a **Project Team** member must inform SBA through eCivis Grants Network.

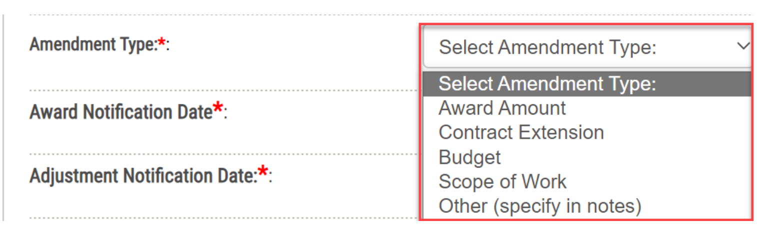
1) On the **Project Dashboard** page, the Agency eCivis user will select *I have received a grant adjustment notice and need to amend my grant agreement* from the **Available Actions** list.



2) The **Grant Status – Grant Amendment** form will appear.



3) The Agency eCivis user will select the **Amendment Type*** from the option list. Based on their selection different fields will appear in the form.



a. *Award Amount*: Enter an increase (positive figure) or decrease (negative figure) in the *Award Adjustment $* field. The Agency eCivis user will see the **Adjusted Total Award $** either increase or decrease depending on the entry in the *Award Adjustment $* field.
   - *Award Adjustment $:* Enter the <u>difference</u> between the initial award total and the adjusted award total. Verify the total award amount in the adjusted Total Award field.

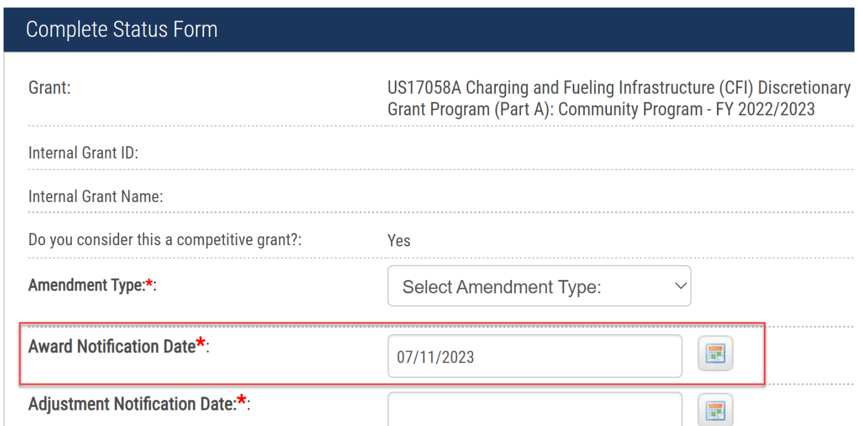
b. *Contract Extension*: Requires changing the **Contract Close Date**. The Agency eCivis user should also change the **Reminder** date if entered.

c. *Budget*: Changes should be stated in the **Grant Amendment Notes*** section e.g., reallocated $100,000 to the Contractual budget category.

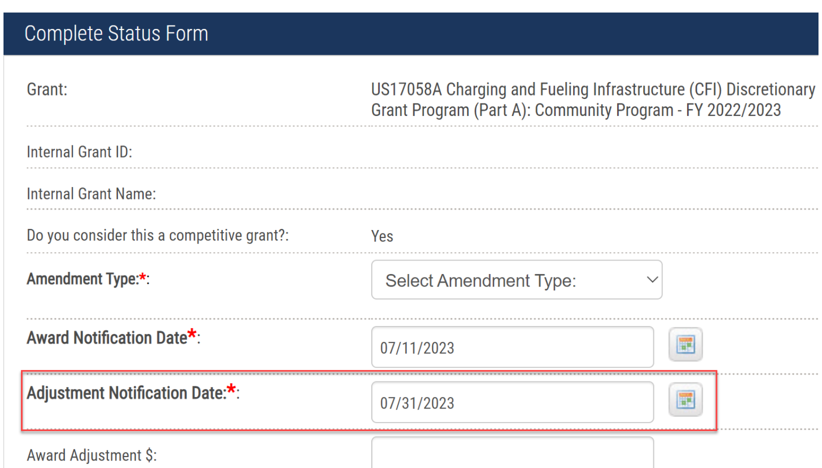
d. *Scope of Work*: Changes should be stated in the **Grant Amendment Notes*** section e.g., the project will now include the counties of X, Y, and Z.

e. *Other (specify in notes)*: Selection indicates to the Agency eCivis user to enter more information in the **Grant Amendment Notes*** section.

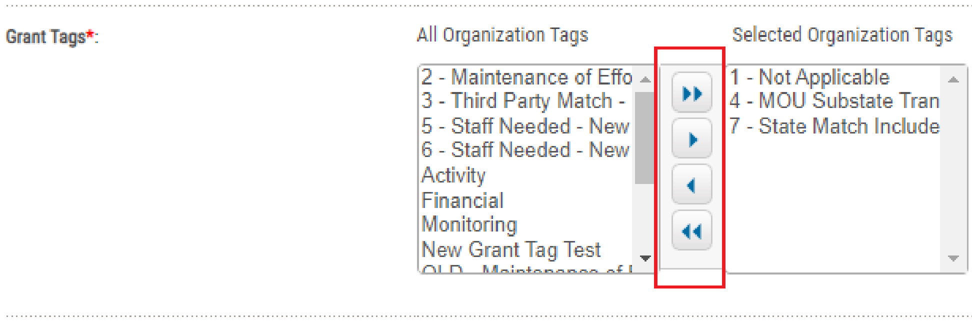
4) The Agency eCivis user will not change the **Award Notification Date*** as that represents the original award date of the grant.



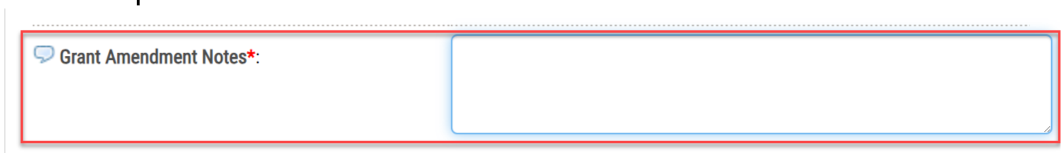
5) The Agency eCivis user will enter the date the amendment was received as stated on the adjustment notice in the **Adjustment Notification Date*** field.



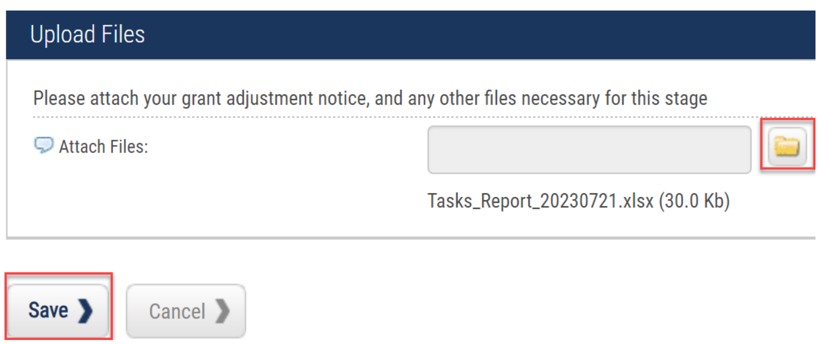
6) Use the left and right arrows to add or remove appropriate **Grant Tags*** based on the amendment.



7) In the **Grant Amendment Notes*** field add any other relevant notes related to the amendment process.



8) The Agency eCivis user will click the *Upload Files Icon* to **upload the amendment notice and a Funding Source Request Form, if appropriate**. If the Agency eCivis user would like to attach files, see *Step 2 – Updating Grant Status to Awarded* for the process. Then click the *Save > button* Save ❯.



9) **Federal Funding Source Adjustment Request** task:

If the amendment is a **decrease or increase in the award amount**, or a **change in the budget period or period of performance**, the Agency eCivis user will need to create two advanced approval tasks.

See *Appendix D – Creating Advanced Tasks* for more guidance. Please include:

SBA Analyst Approval Task
a) Title: 1. SBA Analyst - FS Adjustment
b) Assigned to: Appropriate member of the **Project Team**
c) Designated for Approval: **User Group: SBA Analyst – [Agency Acronym]**

SBA Finance Approval Task
a) Title: 2. SBA Finance - FS Adjustment

b) Assigned to: Appropriate member of the **Project Team**
c) Designated for Approval: **User Group: SBA Finance**
d) Attachments: an updated Funding Source Request Form & the Grant Award.
e) Notes: describe what is being requested & the reason for the request.

NOTE: Wait until SBA Analyst task is approved before sending SBA Finance Approval Task.

10) State Match Adjustment Request task:
If the amendment is a **decrease or increase in the State Match award amount**, or a **change in the budget period or period of performance**, the Agency eCivis user will need to create two advanced approval tasks.

See *Appendix D – Creating Advanced Tasks* for more guidance. Please include:

SBA Analyst Approval Task
a) Title: 1. SBA Analyst - State Match Adjustment
b) Assigned to: Appropriate member of the **Project Team**
c) Designated for Approval: **User Group: SBA Analyst – [Agency Acronym]**

SBA Finance Approval Task
a) Title: 2. SBA Finance - State Match Adjustment
b) Assigned to: Appropriate member of the **Project Team**
c) Designated for Approval: **User Group: SBA Finance**
d) Attachments: an updated State Match Request form & the Grant Award.

NOTE: Wait until SBA Analyst task is approved before sending SBA Finance Approval Task.

Section 5 – Submit State Match Fund Request

State Match will be handled differently than the previous sections for Organization Funding.

For SBA: SBA will create one Organization Funding entry for each appropriate Agency. The **Funding Title** will be the Agency's name with "State Match Fund" and the SFY succeeding it. For example:

- State Match Fund - IN State Budget Agency - SFY24

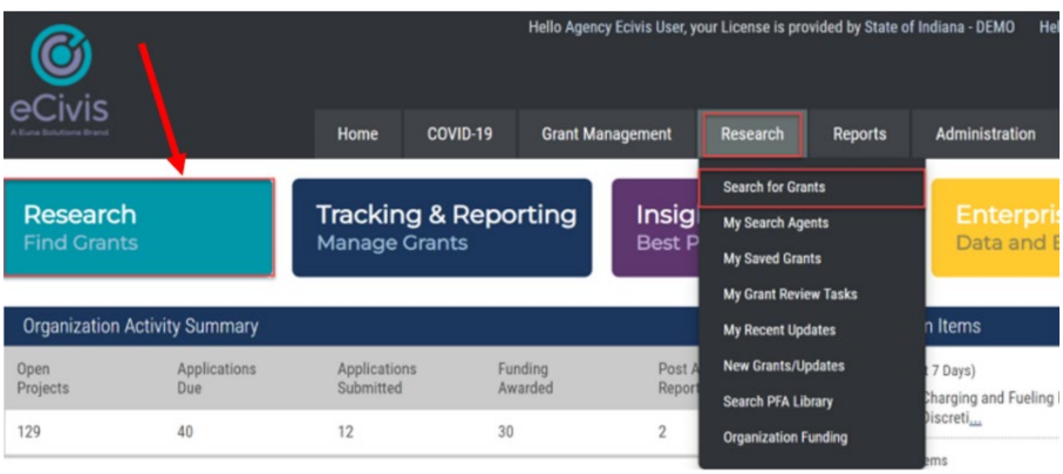
For **Funding Type**, the SBA eCivis user will select "State" because the match is coming from a designated State funding source. The **Agency** field will be populated with the Agency that will be utilizing this State Match Organization funding. In the example above, it would be "IN State Budget Agency."

The **Office**, **FAIN**, **Organization ID**, **Grant Contact**, and **CFDA** fields are not required.

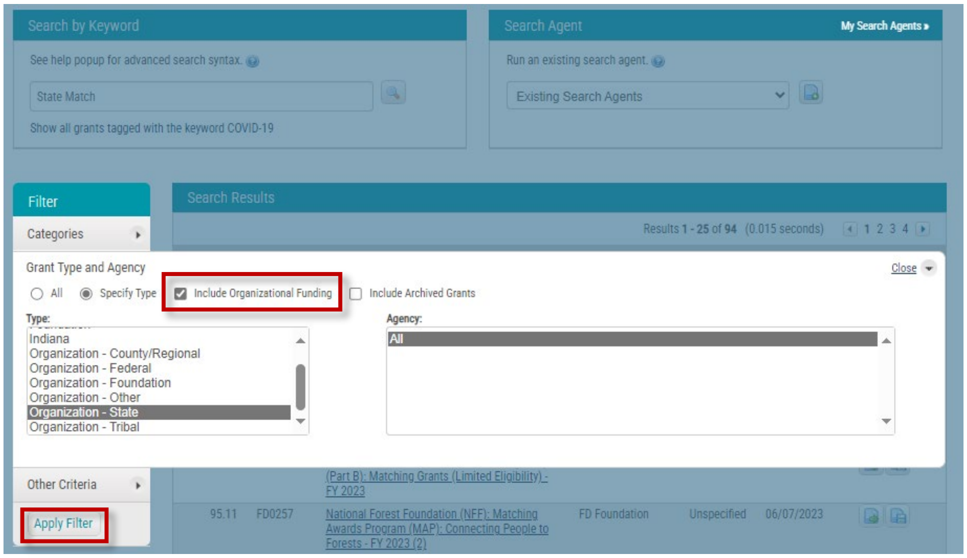
- The **Total Funds** field for State Match Organization Funding will be entered as $1,000,000,000 ($1B). "No" will be selected for the **Matching Required** field.
- The **Attachments** field is not required for this type of Organization Funding.

For Agency eCivis users: From the Organization Funding page, agencies receiving Federal funds that call for a State Match will create a new eCivis project to use their corresponding SBA-created Organization Funding source to fulfill their State Match. Search for your agency's SBA-created State Match Fund:

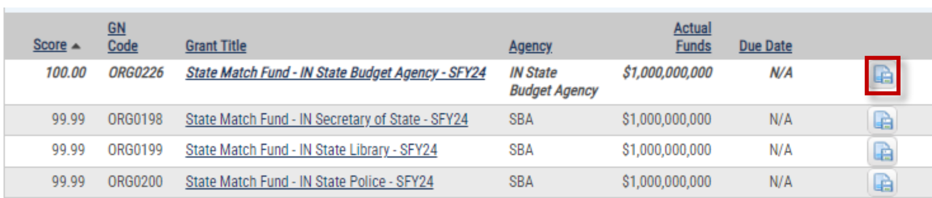
1) Go to Research: Find Grants



2) Search for "State Match Fund" with the following criteria:
   a. Grant Type and Agency > Type > Organization - State
   b. Select the checkbox next to *Include Organizational Funding*
   c. Click **Apply Filter**



3) Click on your agency's State Match Fund or click the *Save/Assign Icon* to assign a new eCivis Project.

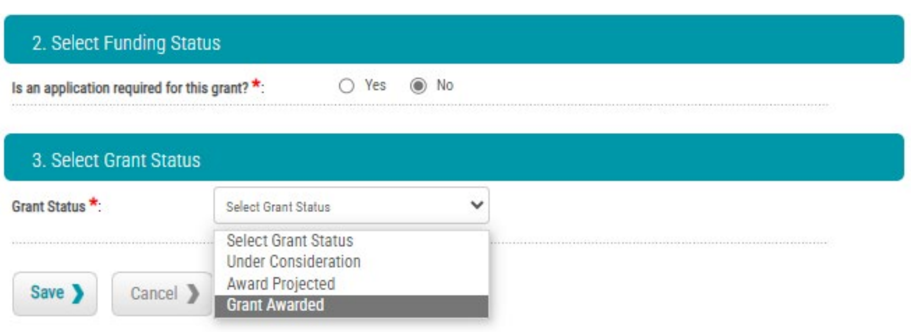


Score	GN Code	Grant Title	Agency	Actual Funds	Due Date	
100.00	*ORG0226*	*State Match Fund - IN State Budget Agency - SFY24*	*IN State Budget Agency*	*$1,000,000,000*	*N/A*	
99.99	ORG0198	State Match Fund - IN Secretary of State - SFY24	SBA	$1,000,000,000	N/A	
99.99	ORG0199	State Match Fund - IN State Library - SFY24	SBA	$1,000,000,000	N/A	
99.99	ORG0200	State Match Fund - IN State Police - SFY24	SBA	$1,000,000,000	N/A	

Create a new eCivis Project: The *Project Title* of the eCivis Project containing the State Match will use the naming conventions from the associated Federal eCivis Project (see *Step 2: Save/Assign a Grant to a New Project* of [eCivis Grants Network Pre-Award User Guide]), ***but with "State Match" preceding it. For example:***

- State Match - Charging Infrastructure (CFI) Discretionary Grant Program - FFY##

This eCivis project will be non-competitive and 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.



Note: For "Amount Awarded", the State Match eCivis Project is only for Cash Match.

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? ***.
Project pe
There are two automatic approval tasks that must be sent to SBA:

1- SBA Analyst - FS/Match/Subgrant - [Agency Acronym] **2- SBA Finance - FS (Funding Source)**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, 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: 1- SBA Analyst - FS/Match/Subgrant - [Agency Acronym]**

Task Name: Rqst Approval: 1- SBA Analyst - FS/Match/Subgrant - [Agency Acronym]
Description: This task serves three purposes at the Grant Awarded stage:
- Federal Funding Source (FS): SBA Analyst reviews & approves.
- State Match: attach a completed State Match Request form.
- Substate Transfer: attach a completed Subgrant Request form.

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 Request 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 State Match Request Form.

Returning to the **Project Dashboard** page, the remaining task titled **Rqst Approval: 2- SBA Finance - FS (Funding Source)**should be completed just like the **Rqst Approval: 1- SBA Analyst - FS/Match/Subgrant - [Agency Acronym]** task.

Note: Completing these two automatic tasks will trigger the approval process with SBA. With the completion of the **Rqst Approval: 2- SBA Finance - FS (Funding Source)**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 State Agency in two ways:

- First, within an automatic eCivis Grants Network generated email indicating that the **Rqst Approval: 2- SBA Finance - FS (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).

Section 6 – Create Substate Transfer Org Funding

For State Agency Grantor of Substate Transfer: For State Agency-to-State Agency/Sub-State Transfers, the state agency providing the funding to another state agency(ies) will create the Organization Funding. In the same way we use a Federal Funding Source to allocate substate transfers, the State Agency must represent that Federal Funding Source with Organization Funding. Agencies will still be required to process the MOU through SCM.

Similar to State Match, if an agency has substate transfers to multiple agencies, the Agency eCivis user can create one Organization Funding opportunity for the receiving agencies to request funding for. See *Appendix F of the Pre-Award User Guide* for guidance on creating Organization Funding.

The Granting State Agency Organization Funding's **Funding Title** will indicate the following:

- The **Funding Title** begins with the agreement type, Substate Transfer.
- The state agency providing the funding by using the acronym naming convention in *Appendix G – State of Indiana Agencies, Acronyms, and BUs*.
- The originating source of funding should be copy/pasted from the Project name that the Granting State Agency set up for its funding e.g., Coronavirus State and Local Fiscal Recovery Funds.
- The FFY included at the end of the title to indicate in which federal fiscal year the funding is available for the state agency's usage. Use two digits to represent the year.

- **Granting Organization Funding's Title Format:**

Substate Transfer - Granting Agency Acronym - Title of original source of funding - FFY##

- For example, SBA was awarded the State and Local Fiscal Recovery Funds. SBA is transferring these federal funds to the Office of Management and Budget ("OMB") for Federal Fiscal Year 2024 through an MOU. A Granting State Agency eCivis user would create a **Funding Title** like the one below:
- Substate Transfer - IN SBA - State Recovery Fund - FFY24

For **Funding Type**, "State" will be selected. **Agency** is the name of the Funder. This field will be populated by the state agency that is the Funder. In the above example, SBA is providing the funds to the IN Office of Management and Budget. See *Appendix G – State of Indiana Agencies, Acronyms, and BUs* for the appropriate naming conventions.

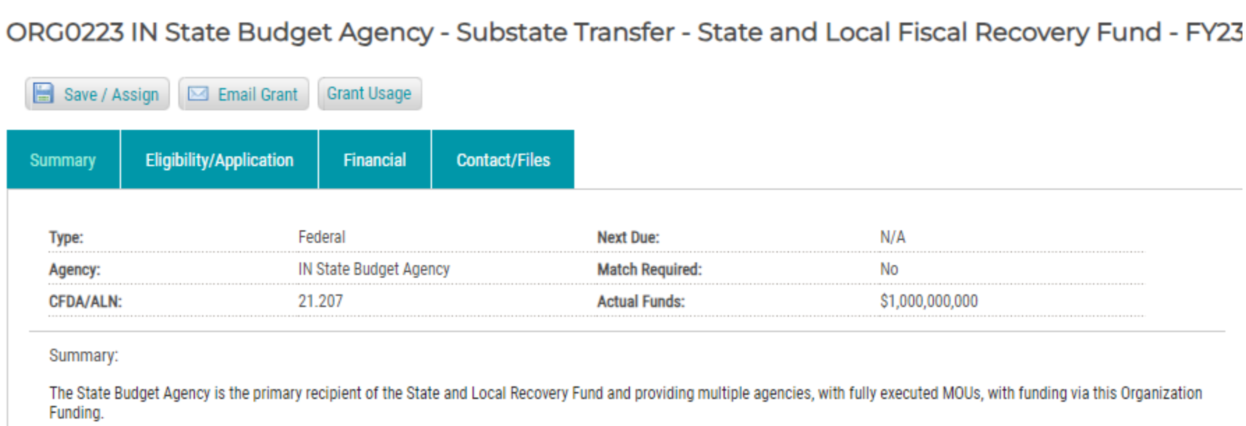
The **Office**, **FAIN**, **Organization ID**, and **Grant Contact** fields are not required. For the **CFDA Number**, the CFDA (Assistance Listing) number will be entered.
In the **Total Funds** field for State-to-State/Department Transfers, the Agency eCivis user for the department/agency entering the Organization Funding will enter the amount available to all state departments/agencies being funded by the originating funding source.

- In the SBA example, SBA was awarded $10,000,000 ($10M) from the U.S Department of the Treasury. SBA will provide $6,000,000 ($6M) to OMB through an MOU. In this case, the **Total Funds** field would be $6,000,000 ($6M) as that is the total amount available for transfer.
- However, if SBA were also providing $4,000,000 ($4M) to the Governor's Office, the Total Funds field would be $10,000,000 ($10M**). This is because the State Agency creates one Organization Funding for all MOUs associated with the original federal funding.**

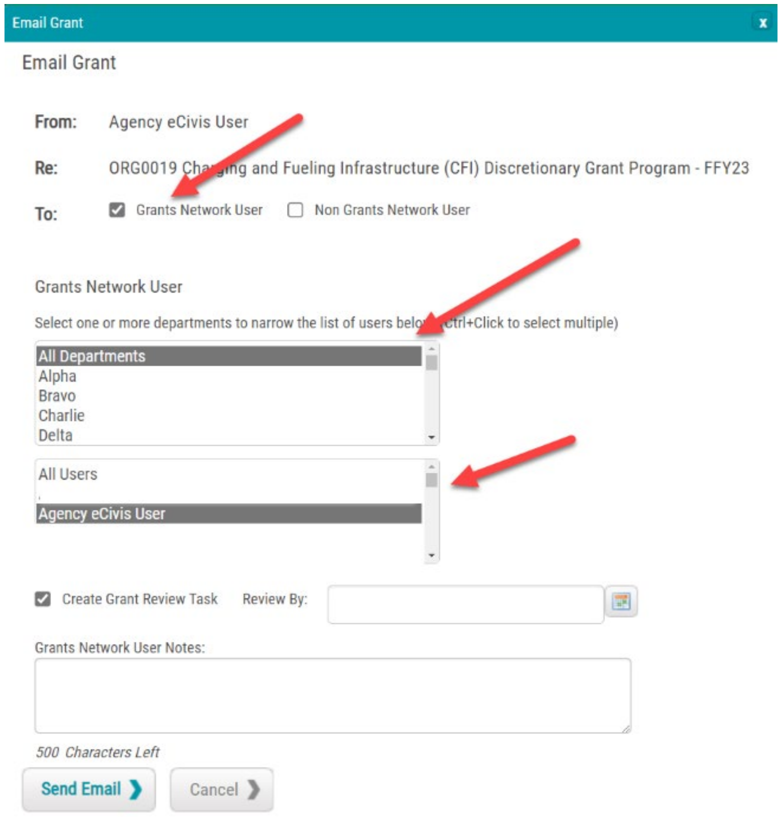
The **Attachments** field allows Agency eCivis users to provide a website link, and/or upload document(s), related to creating the funding opportunity. Although this section is not required by eCivis Grants Network, SBA requires it to verify the data elements entered. Therefore, each State-to-State/Substate Transfer is required to provide one of the following:

- Memorandum of Understanding (MOU);
- Notice of Funding Opportunity (NOFO);
- Notice of Award (NOA);
- Application(s), Certificate(s), and/or Agreement(s);
- Grants.gov listing, and/or;
- SAM.gov Assistance Listing;
- Website or page of the funding opportunity from the Funder.

When the Organization Funding entry is finalized, and in the system, the State-to-State/ Department Transfer will be distributed by using the *Email Grant button* Email Grant at the entered Organization Funding's page.



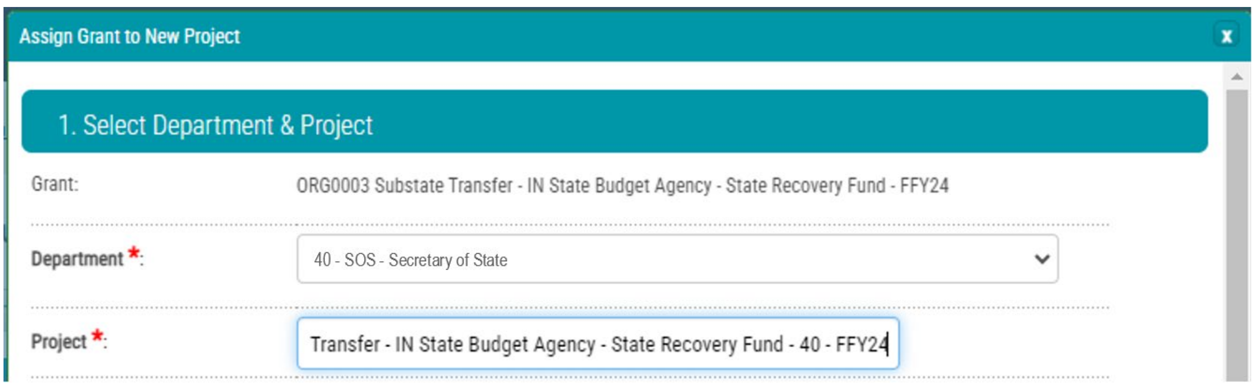
The Agency eCivis user will check the **Grants Network User** box. From there, the Agency eCivis user can select the specific department and Agency eCivis users to which the Organization Funding applies. Additionally, the Agency eCivis user may include a brief explanation of the Organization Funding and instructions for use in the **Grants Network User Notes** box.



For the Substate Grantee ("receiving agency"):

The substate grantee must create a new eCivis project following the steps of the *eCivis Grants Network Pre-Award User Guide* with the following exceptions:

- For the Title, the eCivis user will copy the title of the Substate Transfer Organization Funding, but include Business Unit of the Agency eCivis user between the Federal Grant name and the federal fiscal year. See *Appendix G – State of Indiana Agencies, Acronyms, and BUs* for your Business Unit. For example, if IN Secretary of State were to create the eCivis Project the following would be the titles:
- **Granting Organization Funding Title:**
  Substate Transfer - IN SBA - State Recovery Fund - FFY24
- **Substate eCivis Project Title:**
  Substate Transfer - IN SBA - State Recovery Fund - 40 - FFY24



- Like State Match, Substate Transfer eCivis projects will be non-competitive & move straight to Grant Awarded.
  - 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 substate transfer 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?***.

> Note: Do not select "4 - MOU Substate Transfer - UPLOAD FORM or MOU" since this is the MOU request. However, if the Substate will require a State Match, select the "7 - State Match Included" grants tag.
>
> Note: We recommend adding the appropriate staff from the Granting agency to the eCivis project. This will allow the Granting Agency to add and complete any tasks normally performed in substate transfers.

Upload Files: The fully executed Memorandum of Understanding (MOU) is required to be uploaded before saving.

There are two automatic approval tasks that must be sent to SBA, the 1- SBA Analyst - FS/Match/Subgrant - [Agency Acronym] **task and the 2- SBA Finance - FS (Funding Source)task (including Subgrant Request Form).**

Automatically Assigned Tasks

1. Once the Agency eCivis user has updated the project and grant to **Grant Awarded Stage,** two automatic tasks will appear on the **Project Dashboard** in the **Pending Tasks** section. If the "7 - State Match Included" grants tag was selected before or while filling out the Grant Awarded Status Form, additional automatic tasks will appear.
    - **Task Name**: Rqst Approval: 1- SBA Analyst - FS/Match/Subgrant - [Agency Acronym] **Required Action**: Upload a completed Subgrant Request Form in order for your SBA analyst to perform the functions related to the budget journal process for the substate transfer.

    a. **Task Name**: Rqst Approval: **2- SBA Finance - FS (Funding Source)**
    - **Required Action**: The task will include a blank Subgrant Request Form. Upload a completed Substate Request Form in order to receive a funding source for the substate transfer.

    b. **Task Name:** Submit State Match Fund Request

    Action Required: The Agency eCivis user must request state match by creating a new eCivis project through the agency's dedicated State Match Fund in eCivis.

2. Completing these two automatic tasks will trigger the approval process with SBA.

    NOTE: For Substate Transfer eCivis Projects, the **Rqst Approval: 1- SBA Analyst - FS/Match/Subgrant - [Agency Acronym]** task will be completed, *first*. This allows the Substate Grantee/ Receiving agency's SBA Analyst to create an additional Approval Task to send to the Granting Agency's SBA Analyst.

    Once both SBA Analyst tasks have been completed, **Rqst Approval: 2- SBA Finance - FS (Funding Source)** can be submitted to SBA Finance.
    With the completion of the **Rqst Approval: 2- SBA Finance - FS (Funding Source)**task, the SBA representative will provide the Indiana State Agency its Funding Source Number/ID for the eCivis project and grant and post the necessary Budget Journals.

    a. 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: 2- SBA Finance - FS (Funding Source)**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 & 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).

Section 7 – Program Income and Rebate Organization Funding

According to 2 CFR 200.307, program income is defined as income that “non-Federal entities are encouraged to earn”... “to defray program costs where appropriate.” Program income must be authorized by Federal regulations or the Federal award and is used in one or more of the following approaches: deduction, addition, and/or cost sharing or matching. Please see your agency’s Federal award & eCFR 200.307 Program income for more information.

For Program Income: The eCivis Agency user must represent Program Income with Organization Funding in eCivis Grants Network, in the same way a State Funding Source is used to allocate Program Income in Peoplesoft Financials, i.e. “State Revenue.”.
The **Funding Title** will indicate the following:

- The **Funding Title** begins with the funding type, Program Income.
- The originating source of funding should be copy/pasted from the Project name that the program income is authorized. e.g., Coronavirus State and Local Fiscal Recovery Funds.
- The FFY included at the end of the title to indicate in which federal fiscal year the Program Income funding is available for the state agency’s usage. Use two digits to represent the year. Depending on the source of funding, the FFY will also be included at the end of the title. For example:
- Title Format: Program Income - Title of eCivis originating/funding source project name - FFY##
    - In the previous example, SBA was awarded the Coronavirus State and Local Fiscal Recovery Funds. Since SBA is earning program income from a funded project, the SBA eCivis user would enter:
    - Program Income - Coronavirus State Fiscal Recovery Fund - FFY25

For **Funding Type**, the Agency eCivis user would select “State.”
Agency is the name of the Funder. Please refer to the name of the entity from which the program income is authorized.
The **Office**, **FAIN**, **Organization ID**, and **Grant Contact** fields are not required.
The **CFDA Number** (Assistance Listing) field is required as the funding originated from a Federal source.
The **Summary** field will contain text briefly explaining the program income. For example:

- Program income earned from [insert Federal or State funding source].

The **Attachments** field allows Agency eCivis users to provide a website link and/or upload document(s) related to the creation of the funding opportunity. For Program Income, this section of Organization Funding is not required by SBA.

Program Income eCivis Project
Using the newly-created Program Income Organization Funding, the State Agency must create a new eCivis project following the steps of the [*eCivis Grants Network Pre-Award User Guide*] with the following exceptions:

The **Project Name** should mirror the originating project/funding source created in eCivis with "Program Income" preceding it, as shown in the screenshot, below.

- Like State Match & Substate Transfers, Program Income eCivis projects will be non-competitive & move straight to Grant Awarded.
  - 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 Program Income 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? *.

Upload Files: An award notice/agreement from the originating/funding source grant award for which program income is authorized is required to be uploaded before saving.

There are two automatic approval tasks that must be sent to SBA, the 1- SBA Analyst - FS/Match/Subgrant - [Agency Acronym] task and the **2- SBA Finance - FS (Funding Source)**task.

Automatically Assigned Tasks
1. Once the Agency eCivis user has updated the project and grant to **Grant Awarded Stage,** two automatic tasks will appear on the **Project Dashboard** in the **Pending Tasks** section.
   a. **Task Name**: Rqst Approval: **1- SBA Analyst - FS/Match/Subgrant - [Agency Acronym]**
      - **Required Action**: Allot Control - SBA analyst perform the functions related to Allot Ctrl process for the award and project within eCivis Grants Network.
        - In the *Notes to Approver* section, please include your 10-digit Budget Journal IDs for each of the following: ALLOT, ALLOT_CTRL, and APPROP.
   b. **Task Name**: Rqst Approval: **2- SBA Finance - FS (Funding Source)**
      - **Required Action**: Upload the following to receive a State funding source for the Program Income:
      - A grant award showing that program income is allowed.
      - A spreadsheet showing revenue received in Peoplesoft Financials.

- A Funding Source Request Form that includes the Assistance Listing Number (ALN, formerly known as Catalog of Federal Domestic Assistance, or CFDA) associated with the Federal grant for which the program income is authorized.

2. Completing these two automatic tasks will trigger the approval process with SBA. With the completion of the **Rqst Approval: 2- SBA Finance - FS (Funding Source)**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: 2- SBA Finance - FS (Funding Source)**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).

Program Income Adjustments

See **Section 5 – Award Adjustment/Award Amendment** for adjustment guidance.

In addition to creating the Federal Funding Source Adjustment Request task, when sending the adjustment task for approval, please attach the following:

i. Description of Program Income adjustment
ii. Receipt of Revenue documentation
iii. New Funding Source Request Form

Conclusion

Once the term of the grant has ended and the objectives of the grant have been met, the Agency eCivis user should review the *State of Indiana eCivis Grants Network Policy: Grant Closeout in eCivis and PeopleSoft* for instructions on how to close out their award in eCivis Grants Network and in PeopleSoft.

If the funding is going to be utilized for an Indiana State Agency grant program, then the Agency eCivis user should review the Grantor user guides starting with *State of Indiana eCivis User Guide - Grantor Creating a Solicitation*.

Definitions

Agency eCivis User – A user of eCivis Grants Network. This is a State of Indiana staff person using the system as a Grantee or Grantor. See Grantee and Grantor.

Agreement – May also be referred to as grant agreement. It is a legal instrument executed to provide financial assistance to a Grantee/Subrecipient. See Notice of Award (NOA).

Application – The specific set of forms, documents, and attachments that comprise an Applicant's submission to a solicitation. See Solicitation.

Approval Groups – Groups of State of Indiana employees responsible for approving tasks e.g., State Budget Agency (SBA) approval or financial reports with/without payment/reimbursement requests from Subrecipients. Approval groups may be set up so that any one person in the group can approve the task (Standard) or that all members of the group must approve the task in a specific sequence (Sequential).

Budget – The financial information Applicants are required to submit to the Funder or Grantor detailing how they will spend grant funds, if awarded. This budget is carried over to the awarded grant so that the Grantee or Subrecipient reports financial information at the level of detail required by each grant program.

Budget Period – The time interval from the start date of a funded portion of an award to the end date of that funded portion during which recipients are authorized to expend the funds awarded, including any funds carried forward or other revisions.

Cash Match – A portion of project costs not paid by Federal funds as a direct project expense (*2 CFR 200.306*). This portion of the project costs are provided as cash from the Indiana State Agency or State of Indiana resources.

Competitive Funding – Funding where the Grantor may select the Grantee(s) from among all eligible Grantees/Applicants; may decide to make or not make an award based on the programmatic, technical, or scientific content of an application; and can decide the amount of funding to be awarded.

Department – Departments built within eCivis Grants Network. A single Indiana State Agency may have one or more departments within eCivis Grants Network representing their divisions, offices, agencies, etc.

Department Master Account Holder (DMAH) – An Agency eCivis user that can see across their entire eCivis Grants Network listing or department, typically an Indiana State Agency Lead. Please see the *State of Indiana eCivis Policy: User Management* for more information.

Discretionary Funding – See Competitive Funding.

eCivis – The software vendor that created eCivis Grants Network (Indiana State Agencies as Grantees/Grantors) and eCivis Portal (Applicants/Subrecipients to Indiana State Agencies' grant programs).

eCivis Project – Project is used in two ways within eCivis Grants Network, Grantee project and Grantor project. See Grantee Project and Grantor Project.

Funder – See Grantor.

Goals – The outcomes to be achieved as a byproduct of the projects or programs administered by an Indiana State Agency. Goals can be captured and tracked in eCivis Grants Network, depending on the requirements of each grant program.

Grant Agreement – See Agreement.

Grant Amendment – An amendment (either initiated by the Grantor or Grantee/Subrecipient) that will officially change the terms of the agreement. An amendment can edit the scope of work, grant term, or financial information.

Grant Stage – The status of a Grantee project and grant in eCivis Grants Network. There are eleven Grant Stages in eCivis Grants Network. They are:

- Under Consideration – the Indiana State Agency is vetting the grant program internally to consider if it will apply for the grant.
- Will Not Apply – the Indiana State Agency decided to pursue the grant program but eventually did not apply.
- Will Not Pursue – following the Indiana State Agency's internal vetting process, the decision was made not to pursue the grant program.
- Award Projected – the Funder/Grantor informed the Indiana State Agency that its project was awarded without funding allocated to it.
- Application Preparation – the Indiana State Agency is developing its application for submission.
- Application Submitted – the Indiana State Agency submitted an application to the grant program.
- Not Awarded – the Indiana State Agency received a non-award notification from the Funder/Grantor.
- Implementation – post-award when reporting starts on the awarded project and grant.
- Grant Awarded – the Indiana State Agency received an award notification with funding for its submitted application.
- Funding Allocated – an awarded project and grant provides funding to other Indiana State Agencies through specific functionality in eCivis Grants Network.
- Grant Closeout – after Implementation, the process of finalizing the funding received and expended along with submission of any final reports.

Grant Tags – Also referred to as Organization Tags. They are a tool used in eCivis Grants Network to help further identify and organize projects and grants.

Grantee – Persons or organizations who receive funding from another party. Indiana State Agencies operate in the role of a Grantee when they receive funding from external parties like the Federal government. A Grantee is also referred to as a Subrecipient.

Grantee Project – Indiana State Agencies can manage grants that they pursue from pre-award to post-award by creating a project.

Grantor – Persons or organizations that provide grant funding to another party. Indiana State Agencies operate as Grantors when they distribute grant funds to Subrecipients (Grantees). Also, referred to as a Funder.

Grantor Project – A project title is required for each application submitted by an Applicant and an award granted by an Indiana State Agency. The Subrecipient or the Grantor (Indiana State Agency) can edit the project title at any time. The project title is called Project or Project Name in eCivis Grants Network.

Grants Network (GN) – The eCivis name for the software. eCivis also refers to the system as "eCivis," "eCivis Grants Network," or "GN."

In-Kind Match (Third-Party In-Kind Contribution) – The value of a non-cash contribution (i.e., property or services) that—(1) benefit a Federally-assisted project or program; and (2) are contributed by non-Federal third parties, without charge, to a non-Federal entity under a Federal award (*2 CFR 200.1*).

Memorandum of Understanding (MOU) – Considered formalized written documents between State agencies that involve programmatic and/or fiscal issues and enunciate mutual understandings, agreements, duties, responsibilities, policies, procedures, timeframes, and other matters as necessary and appropriate (*SBA FMC 3.4*).

Non-Competitive Funding – Funding in which the awarding agency has selected the Recipients and/or amount of funding through formula, criteria, or non-competitive means.

Notice of Award (NOA) – A legal document notifying the Recipient that an award has been made and funds may be requested from the awarding agency.

Notice of Funding Opportunity (NOFO) – A formal announcement of the availability of funding through a financial assistance program from an awarding agency.

Pass-Through Entity – The non-Federal entity that provides a subaward to a Subrecipient to conduct part of a Federal program.

Pass-Through Funding – Refers to funding given to a non-Federal entity that provides a subaward to a Subrecipient to conduct part of a Federal program.

Period of Performance (Performance Period) – Time interval between the start of an award and the end date. Referred to also as the Grant Term and Project Period.

Post-Award – Post-award can be utilized in two aspects of the grant lifecycle, Post-Award Grantee and Post-Award Grantor. See their definitions for more specifics.

Post-Award Grantee – A stage in the lifecycle of a grant after the Indiana State Agency has accepted the award. Components of the post-award process include financial reporting, activity reporting, Subrecipient management, and closeout. See Pre-Award and Pre-Award Grantee definitions too.

Post-Award Grantor – A stage in the lifecycle of a grant after the award has been made to a Subrecipient. Components of the post-award process include status reporting, financial reporting/payment request, payment processing, and closeout. See Pre-Award and Pre-Award Grantor definitions too.

Pre-Award – Pre-award can be utilized in two aspects of the grant lifecycle, Pre-Award Grantee and Pre-Award Grantor. See their definitions for more specifics.

Pre-Award Grantee – A stage in the lifecycle of a grant that precedes the awarding of the grant. Components of the pre-award process include application, application review and evaluation, and application submission to the Grantor (Federal, foundation, etc.).

Pre-Award Grantor – A stage in the lifecycle of a grant that precedes the awarding of a grant. Components of the pre-award process include solicitation setup, application creation, application launch, submitted application review and evaluation, award approval, and award finalization. See Post-Award and Post-Award Grantor.

Program – The release of funds to Subrecipients. Programs are also referred to as "grant programs." For example, The Office of Community and Rural Affairs releases a grant program to accept applications for the Community Development Block Grant (CDBG) application.

Project – See Grantee Project.

Project Lead – The grant program manager or other departmental authority for a specific Grantee project in eCivis Grants Network. Also, Project Lead is referred to sometimes as simply the Lead.

Project Period – See Period of Performance.

Solicitation – The public-facing notification of available grant funding. The solicitation setup in eCivis Grants Network creates either public-facing or internal content, dependent upon program-specific settings. See Notice of Funding Opportunity (NOFO).

Subaward – An award provided by a Pass-Through Entity to a Subrecipient for the Subrecipient part of a Federal award received by the Pass-Through Entity.

Subrecipient – An entity that receives a grant from an Indiana State Agency utilizing eCivis Grants Network. Also, it can be referred to as a Grantee of the Indiana State Agency.

Task – A system-generated "to do" that must be completed. Tasks can be manually created, or system-generated as part of a workflow. See Workflow.

Unique Entity Identifier (SAM) or UEI – A non-federal entity is required to have a UEI to apply for, receive, and report on a federal award. A UEI may be obtained from *www.sam.gov*.

Workflow – A series of review and approval activities or tasks that must be completed to accomplish specific parts of the grant process, e.g., State Budget Agency (SBA) approval or financial reports with/without payment/reimbursement requests from Subrecipients.

Appendix A – Grant Awarded Fields

eCivis Grants Network and SBA Required Fields and Sources

The following fields are required by either eCivis Grants Network or SBA and have specific data that is required to be entered by an Agency eCivis user as described.

eCivis Grants Network Data Field	Data to be Entered
Internal Grant Name	Reserved for SBA usage. Leave this field blank.
Do you consider this a competitive grant?	"Yes" is a grant that was reviewed and scored by the funder for award.
	"No" is a grant that was formula-based.
Award Notification:	Enter the date of the NOA. If an agreement, enter the date of the last signature.
Awarded $:	The award amount that the Indiana State Agency has the authority to draw and spend from the funder.
Match Required:	Defaulted by eCivis Grants Network dependent on the NOFO requirement.
If Yes, Match Type:	Cash, In-Kind, Cash/In-Kind
Cash Match $:	The amount of cash the Indiana State Agency or others are providing for the grant match.
In-Kind Value:	The value of the non-cash contribution of goods and services by the Indiana State Agency or others for the grant match.
Contract Start Date:	The Budget Period Start Date as stated in the NOA or agreement. If only a period of performance/performance period/project period is stated, it is the Start Date of it.
Contract Close Date:	The Budget Period End Date as stated in the NOA. If only a period of performance/performance period/project period is stated, it is its End Date.
Award Type:	Advance Payment is a lump sum allocation.
	Reimbursement is when the Indiana State Agency must incur the expense and submit to the funder for payment.
UEI:	The Unique Entity Identifier (UEI) assigned by the General Services Administration (GSA) SAM.gov.
Grantor Contract Number:	The unique identifier for the award or agreement provided by the funder e.g., FAIN, Grant Award Number, Grant Number, Award Number, Document Number, etc.
Grant Tags:	The tags selected in the earlier Stages of Under Consideration Stage, Application Preparation Stage, and Application Submitted Stage will carry forward to Grant Awarded Stage. The Agency eCivis user should review and make any necessary updates.

eCivis Grants Network Data Field	Data to be Entered
Notes:	Should include project period estimate (length of entire project and cumulative funded amount), any information regarding using the funding for a pass-through grant program, and/or any other information that should be shared with SBA and/or internally with the Project Team at this point.
Are awarded funds to be available for use as pass-through funding?	Defaults to “No” which means that this funding is not going to be used for a grant program and have Subrecipients.
	“Yes” means that the Indiana State Agency will use all or part of this funding for a grant program and have Subrecipients.
If Yes, Amount to earmark for pass-through funding:	Enter the amount to be used for the grant program. The amount cannot be more than the Awarded $ entered. An Agency eCivis user will have the ability to update this amount as needed through the grant term.
Are awarded funds to be available for allocation to sub-projects?	Defaults to “No” and should remain “No” as the State of Indiana is not using this functionality at this time.
Attach Files:	Notice of Award/agreement and the Funding Source Request Form are required to be uploaded. Size restrictions for attachments: 40 MB maximum per file.

Appendix B – Project Dashboard Guide

eCivis Project Dashboard Guide

The Project Dashboard in eCivis Grants Network acts as a centralized location to manage a project throughout all grant stages. The Agency eCivis user can do this by utilizing various tabs within the Project Dashboard.

Overview

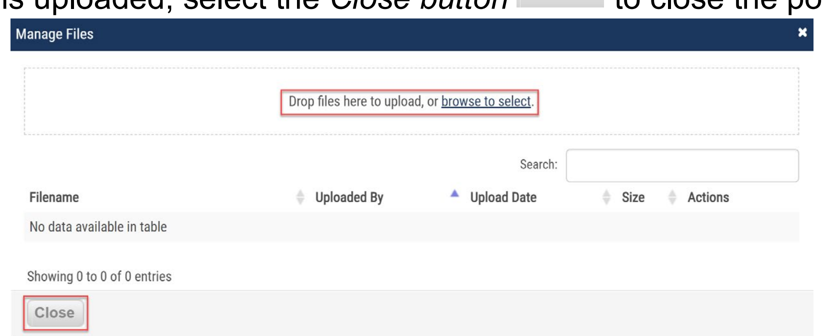
The main page for the project and grant where the Agency eCivis user can see the current stage of the project and grant and any related stage information (e.g., **Application Due Date**, **Awarded** and **Match** amounts, etc.), **Project Team** members, **Available Actions**, **Pending Tasks**, **Completed Tasks**, **Approval History**.

Documents

This tab displays files organized by grant stage and all documents associated with the project. Documents may be uploaded via an assigned task, as part of the project creation, moving from one stage to another, or manually.

To manually add a document at the current, or any previous, stage:

1) Select the *Manage Files Icon*.
2) Drag or browse to select a file from Agency eCivis user's computer.
3) Once the file is uploaded, select the *Close button* Close to close the pop-up window.



Project Dashboard Guide: Grant Lifecycle Tab

This tab displays the progression of a project and grant by the stages (**Under Consideration Stage**, **Application Preparation Stage**, **Application Submitted Stage**, **Grant Awarded Stage**, **Implementation Stage**, and **Grant Closeout Stage**). Each stage may have files, notes, or **Grant Tags** associated with them.

Grant Lifecycle Report

Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021

US17341 Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021

Stage	Completed On	Completed By	Files	View/Edit	Last Updated On	Created On	Notes
Application Preparation	08/03/2023	Project Lead				08/03/2023	

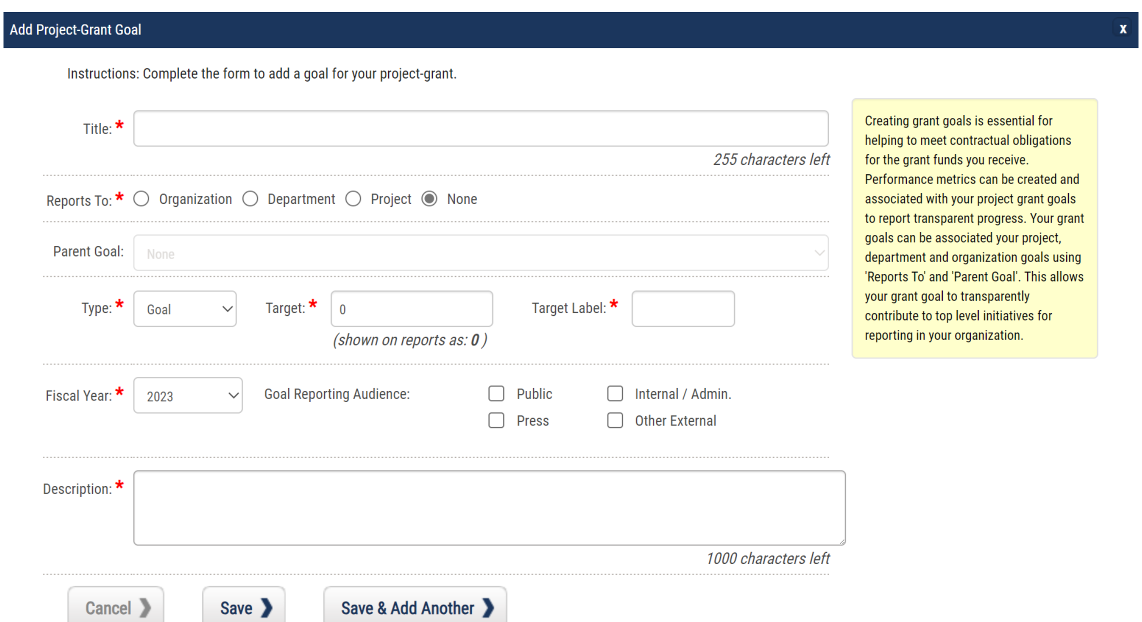
To make changes to a grant stage:

1) Click the *View/Edit Icon* for the **Stage** to be changed.
2) The appropriate stage **Complete Status Form** will appear and an Agency eCivis user will utilize the different options changing the needed information, including **Grant Tags**, additional **Notes**, and adding files (same process as in the **Documents** tab).
3) Select the *Save > button* Save or the *Cancel > button* Cancel to exit this screen to return to the **Grant Lifecycle** page.

Project Dashboard Guide: Goals and Metrics

Creating a Project Goal

1) Select the *+Open button* Open on the right-hand side of the **Project Goals** banner. Clicking on the *Create Goals button* Create Goals will display a new pop-up window for creating a goal.



eCivis Grants Network Field	Display
Title	The title of the goal, a 255-character limit
Reports To	Radio button selection indicating how to relate this new goal to an existing goal. At the Project level, you could choose *Department* or *Organization* or *None*. This choice helps you build a parent/child relationship between goals. Making a choice other than None here will enable the next field, Parent Goal.
Parent Goal	Disabled by default if a choice (other than *None*) is made in Reports To. The dropdown menu will populate with existing goals to build a parent/child relationship.
Type	The dropdown menu choices include: *Objective, Priority, Goal, Output, Outcome, Other* (Goal is the default). If *Other* is selected, a new text field appears, below type, with a label of Custom Type limited to 20 characters. This allows an Agency eCivis user to create a custom goal type not listed in the dropdown menu.
Target	A numerical value desired to achieve by this goal. This field is limited to a max value of 9,999,999.
Target Label	Text that describes the previously entered target. This field allows for 20 characters of text with no special characters, commas, or dashes.
Fiscal Year	A dropdown menu showing the previous 15 years and the next 15 years. Default selection is current year.
Goal Reporting Audience	These selections represent an audience tag that can be filtered on during the reporting process.
Description	A free form text area with 1,000 characters maximum used to describe the goal in greater detail.

2) Selecting the *Cancel > button* will discard all entries and close the Add a Project Goal pop-up window.

   Selecting the *Save > button* will validate that all required entries have been entered and close the pop-up window displaying the newly entered goal in the grid.

   The *Save & Add Another > button* works similarly to the Save > button, but instead of showing the newly entered goal in the grid, it will automatically open another Add Project Goal pop-up window.

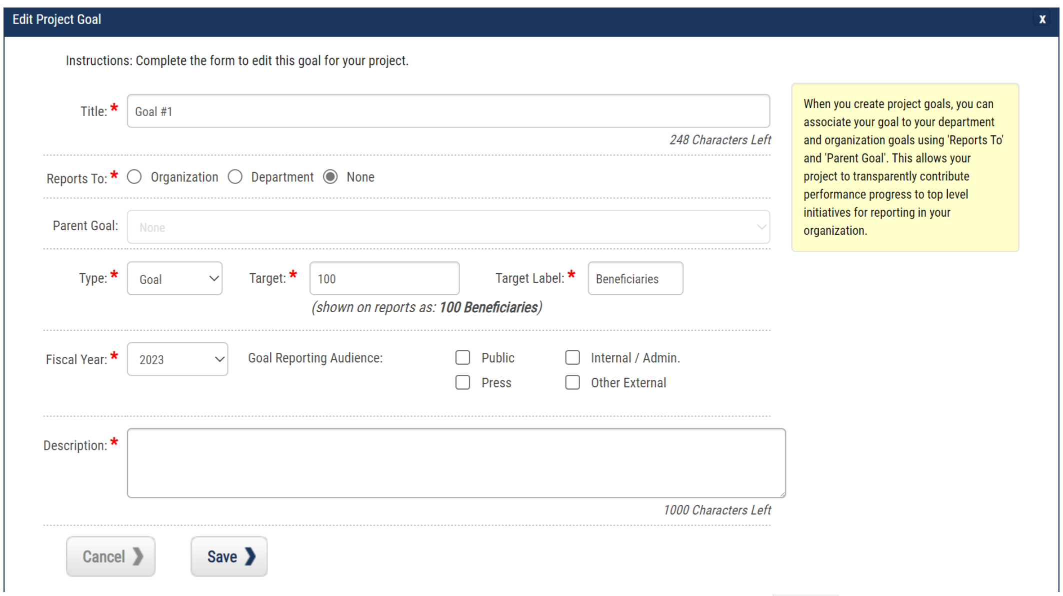
Editing a Project Goal

To make changes to existing goals:

1) On the Goals & Metrics page click the *+Open button* located in the **Project Goals** bar. Then click the *Edit button* in the upper right corner of the **Project Goals** view.

2) Each existing goal title will now become a clickable hyperlink and when the goal title is selected it will open the **Edit Project Goal** window pre-populated with the current goal values.

3) From this window edit any of the fields and then click the *Save > button*  or *Cancel > button*  .

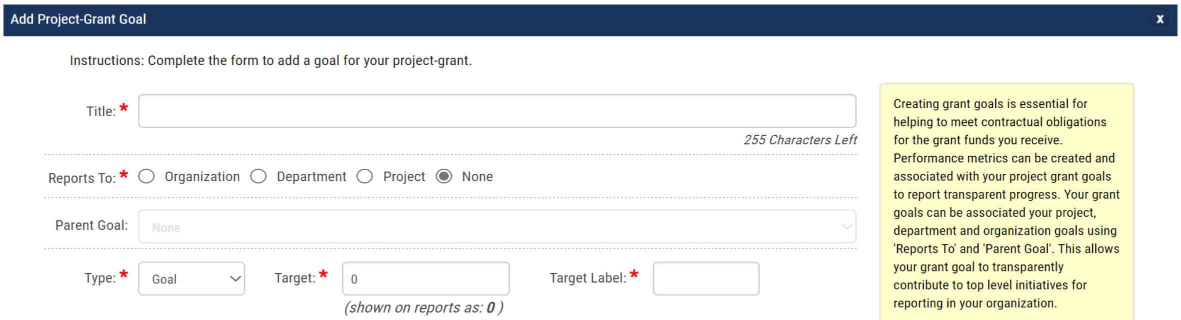


4) Returning to the **Project Goals** view, click the *Done button*  in the upper right corner to exit edit mode.

Grant Goals and Metrics

Creating a Grant Goal

1) Select the + *Open button* Open on the right-hand side of the **[Grant Title]** banner. Clicking on the + *Create Goals button* Create Goals will display a new pop-up window for creating a goal.



eCivis Grants Network Field	Display
Title	The title of the goal, a 255-character limit
Reports To	Radio button selection indicating how to relate this new goal to an existing goal. At the Project level, you could choose *Department* or *Organization* or *None*. This choice helps you build a parent/child relationship between goals. Making a choice other than *None* here will enable the next field, Parent Goal.
Parent Goal	Disabled by default if a choice (other than *None*) is made in Reports To. The dropdown menu will populate with existing goals to build a parent/child relationship.
Type	The dropdown menu choices include: *Objective, Priority, Goal, Output, Outcome, Other* (Goal is the default). If *Other* is selected, a new text field appears, below type, with a label of Custom Type limited to 20 characters. Allowing an Agency eCivis user to create a custom goal type not listed in the dropdown menu.
Target	A numerical value desired to achieve by this goal. This field is limited to a max value of 9,999,999.
Target Label	Text that describes the previously entered target. This field allows for 20 characters of text with no special characters, commas, or dashes.
Fiscal Year	A dropdown menu showing the previous 15 years and the next 15 years. Default selection is current year.
Goal Reporting Audience	These selections represent an audience tag that can be filtered on during the reporting process.
Description	A free form text area with 1,000 characters maximum used to describe the goal in greater detail.

2) Selecting the *Cancel > button* will discard all entries and close the **Add a Project Goal** pop-up window.

Selecting the *Save > button* will validate that all required entries have been entered and close the pop-up window displaying the newly entered goal in the grid.

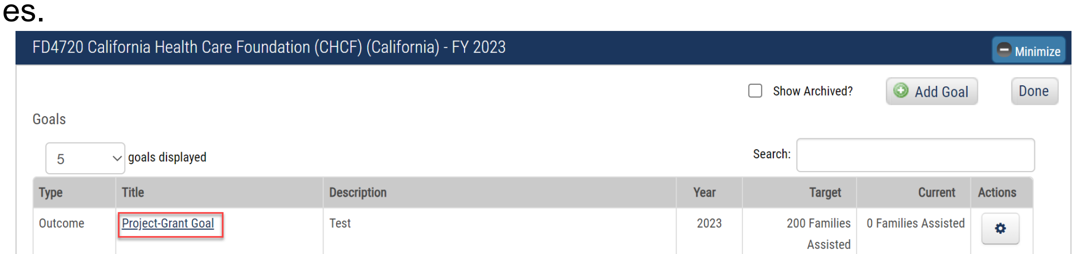
The *Save & Add Another > button* works similarly to the *Save > button* but instead of showing the newly entered goal in the grid, it will automatically open another **Add Project Goal** pop-up window.

Editing a Grant Goal

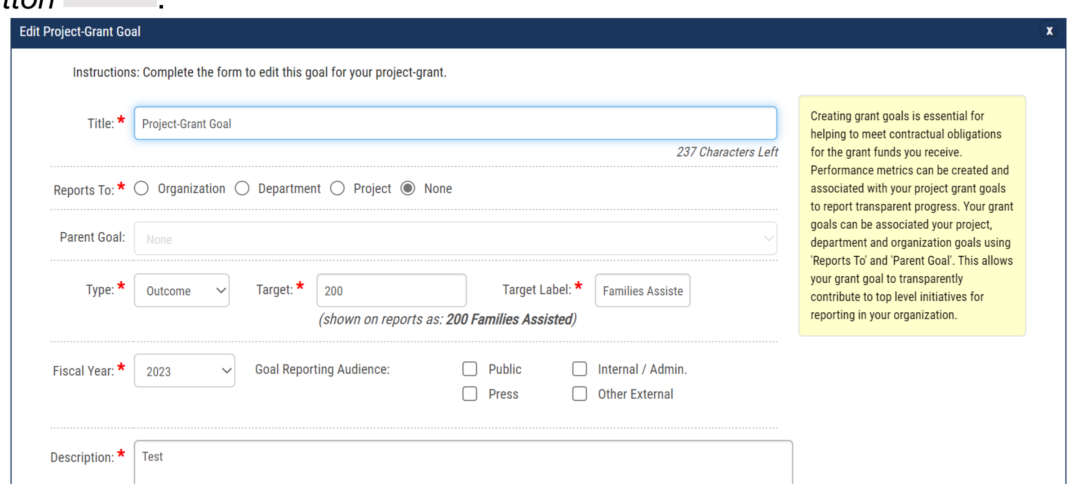
To make changes to existing goals:

1) On the Goals & Metrics page click the *+Open button* located in the **Grant Goals** bar. Then click the *Edit button* in the upper right corner of the **Grant Goals** view.

2) Each existing goal title will now become a clickable hyperlink and when the goal title is selected it will open the **Edit Grant Goal** window pre-populated with the current goal values.



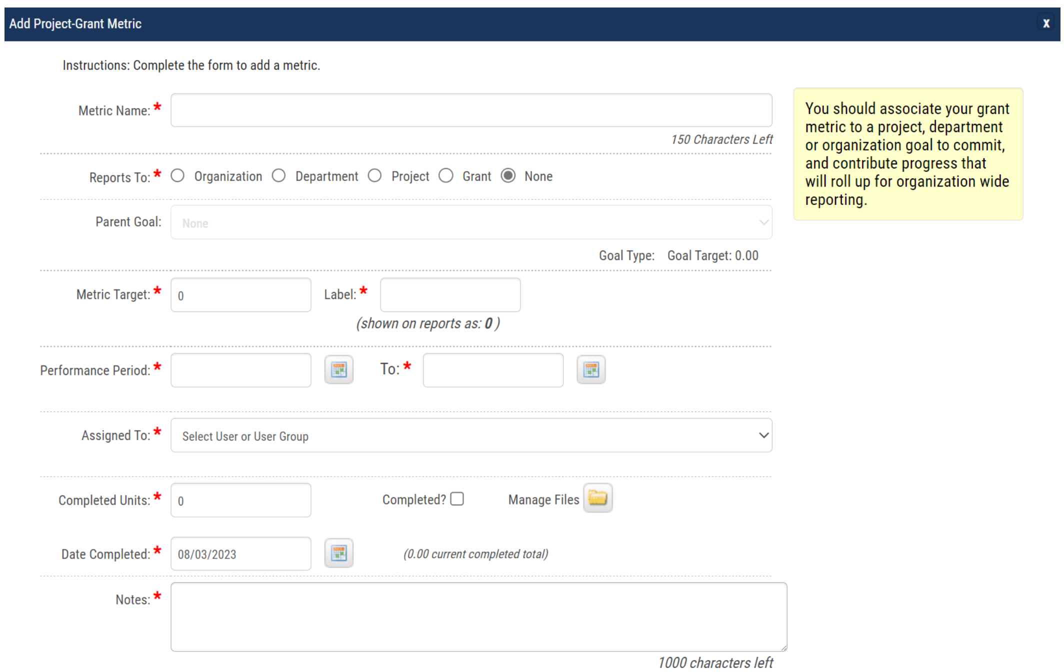
3) From this window, edit any of the fields and then click the *Save > button* or *Cancel > button*.



4) Returning to the **Grant Goals** view click the *Done button* Done to exit edit mode.

Creating a Metric

1) Clicking the +*Create Metrics* Create Metrics will display a new pop-up window for creating a metric.



eCivis Grants Network Field	Display
Metric Name	The title of the metric, a 150-character limit
Reports To	Radio button selection indicating how to relate this new goal to an existing goal. This choice helps you build a parent/child relationship between goals. Making a choice other than *None* here will enable the next field, Parent Goal.
Parent Goal	Disabled by default if a choice (other than *None*) is made in Reports To. The dropdown menu will populate with existing goals to build a parent/child relationship.
Metric Target	A numerical value desired to achieve by this goal. This field is limited to a max value of 9,999,999.

Label	Text that describes the previously entered target. This field allows for 20 characters of text with no special characters, commas, or dashes.
Performance Period (From and To)	An input for the start and end date of the performance period in the format of MM/DD/YYYY. Clicking the calendar button will display a calendar picker for the date.
Assigned To	A dropdown menu that includes project team members.
Completed Units	Represents the amount of completed units. At creation the value defaults to 0 but can be changed if the metric is already in process.
Completed?	Designates if the metric evaluation has concluded.
Manage Files	Allows for the upload, removal, and management of external documents related to this metric.
Date Completed	Date of the latest edit or measurement of the metric.
Notes	A free form text area with 1,000 characters maximum used to describe the metric in greater detail.

2) Selecting the *Cancel > button* will discard all entries and close the Add a Metric pop-up window.

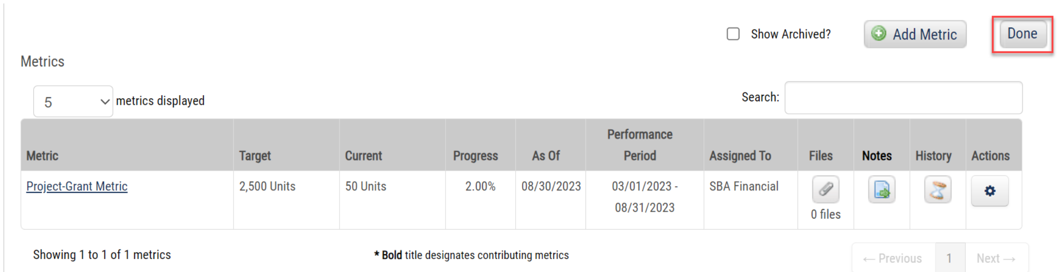
   Selecting the *Save > button* will validate that all required entries have been entered and close the pop-up window displaying the newly entered metric in the grid.

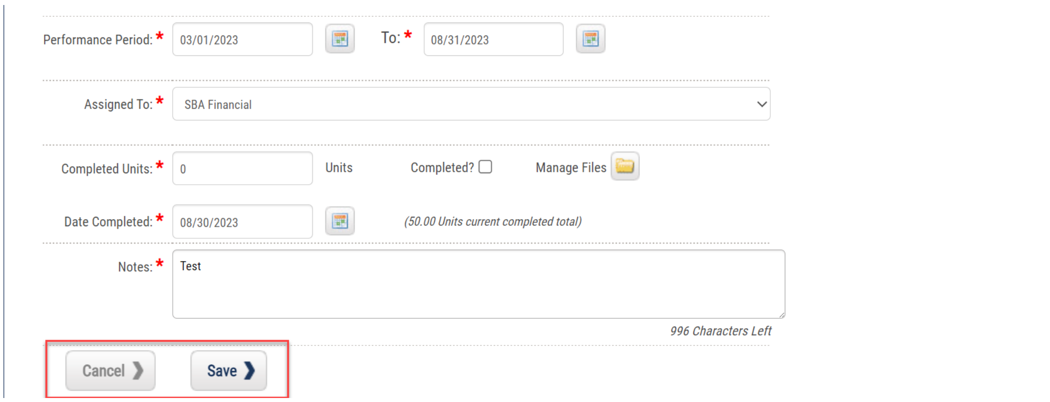
   The *Save & Add Another > button* works similarly to the *Save > button* but instead of showing the newly entered metric in the grid, it will automatically open another **Add Metric** pop-up window.

Editing a Metric

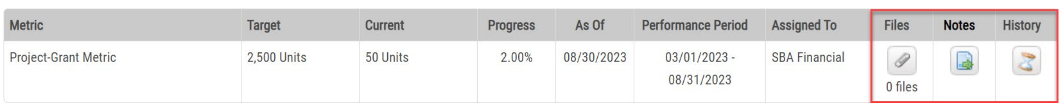
To make changes to an existing metric:

a. Select the *Edit button* in the upper right corner of the metrics view.
b. Each existing metric title will be a clickable hyperlink that when selected will open a window pre-populated with the current metric values.
c. While in edit mode update the *Completed Units* and the *Date Completed* to capture the current activity during the defined period.
   a. Selecting the *History Icon* in the grid will display all previously entered Completed Units and Date Completed values.
d. In the **Edit Metric** window select the *Save > button* or *Cancel > button* to close and then click the *Done button* to exit edit mode.





Read-Only Metric Views and Options



The *Files Icon* will open a window allowing Agency eCivis users to review and download documents relevant to the metric.

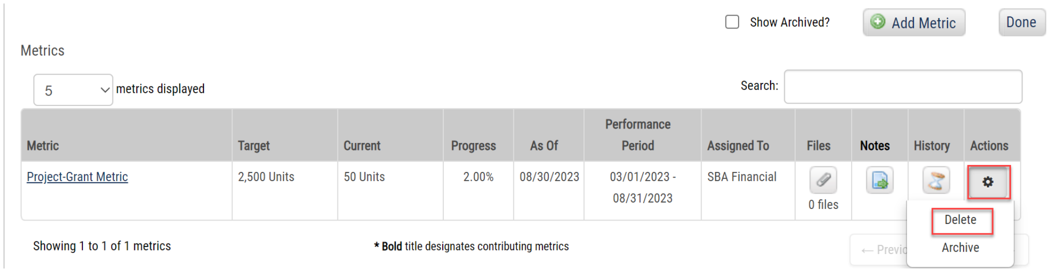
The *Notes Icon* will display available notes associated with the metric.

The *History Icon* will display all of the metric progress and version history.

Metric Action – Deleting a Metric

A metric may only be deleted if it has no links to other goals and no progress reported. Attempting to delete a metric where links or progress is recorded will stop the deletion and the Agency eCivis user will get a red error notice “This metric can’t be deleted. It has reported progress. You can only archive this metric.” If a metric can be successfully deleted, it is a ‘soft delete’ and not permanently deleted from our system. However, restoring a deleted metric will require the eCivis Customer Success Team. [Contact the SBA Grants Management Team](#) for assistance. Deleted metrics disappear from eCivis Grants Network and are not accessible via reports.

1) Select the *Edit button* Edit in the upper right corner of the metrics view. From the *Actions* menu select the *Settings Icon* , choose *Delete*.

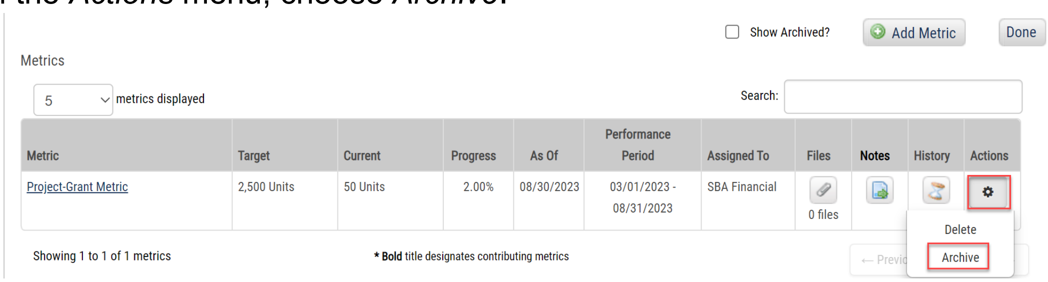


Metric Action – Archiving a Metric

Performing an archive is relatively simple and removes the metric from an ‘active’ status to an ‘archived’ status. Archived metrics are still accessible to Agency eCivis users by clicking on the *Show Archived* checkbox.

When a metric is archived, the status of the metric is changed and put into the archive view. Archived metrics do not show up on active dashboards unless you choose *Show Archived* and archived metrics also do not show up on reports. The system will provide a confirmation message that the metric was successfully archived.

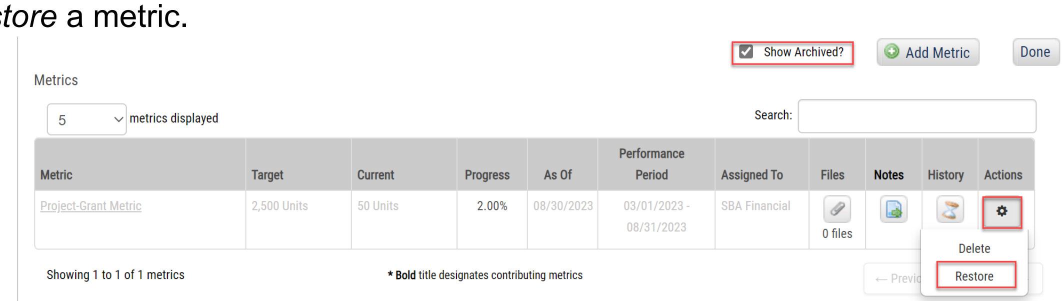
1) From the *Actions* menu, choose *Archive*.



Metric Action – Restoring From Archive

Performing a restore moves the archived metric to an “active” status. It’s relatively easy to archive and restore a metric. Restored metrics show up in the normal “active” view in dashboards.

1) From the *Actions* menu click the *Settings Icon*  (in *Show Archived* view), choose *Restore* a metric.



Project Dashboard Guide: Budgets

<u>Budgets</u>

The **Budget** tab is used to create and manage budget data for the project and grant. This section will not be managed or updated by Agency eCivis users; data will be interfaced, in its entirety, nightly with PeopleSoft finance information.

<u>Contracts & Accounts</u>

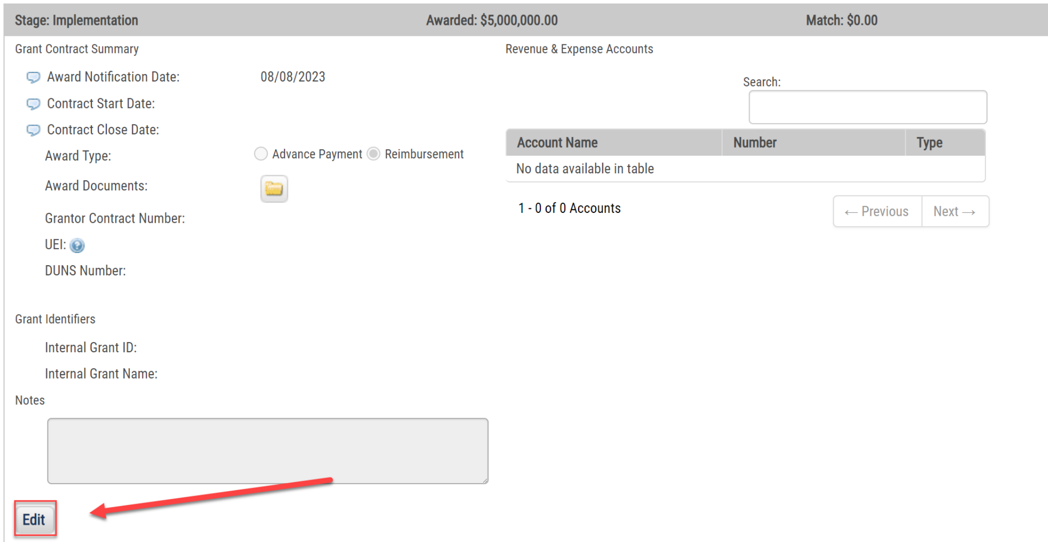
This tab contains summary-level information that was entered at the time of award regarding the awarded grant for the project. It contains the following data elements:

eCivis Grants Network Field	Display
Stage	Current grant stage of the project.
Awarded	The current awarded amount.
Match	Amount, if any, required in Match.
Award Notification Date	The date the grant was awarded.
Contract Start Date	The budget period start date. If only a period of performance/performance period/project period, its start date.
Contract Close Date	The budget period end date. If only a period of performance/performance period/project period, its end date.
Award Type	Either Advanced Payment or Reimbursement selected.
Award Documents	Opens the Documents tab to view all saved files by grant stage.
Grantor Contract Number	The unique award identifier like the Federal Award Identification Number or FAIN from a Federal funder.
UEI	The Indiana State Agency's Unique Entity Identifier (UEI).
DUNS	Not required by either eCivis Grants Network or SBA.
Internal Grant ID	SBA-entered assigned Funding Source Number/ID
Internal Grant Name	Reserved for SBA usage. Leave this field blank.
Notes	Additional information that may need to be tracked at a summary level for the project and grant.

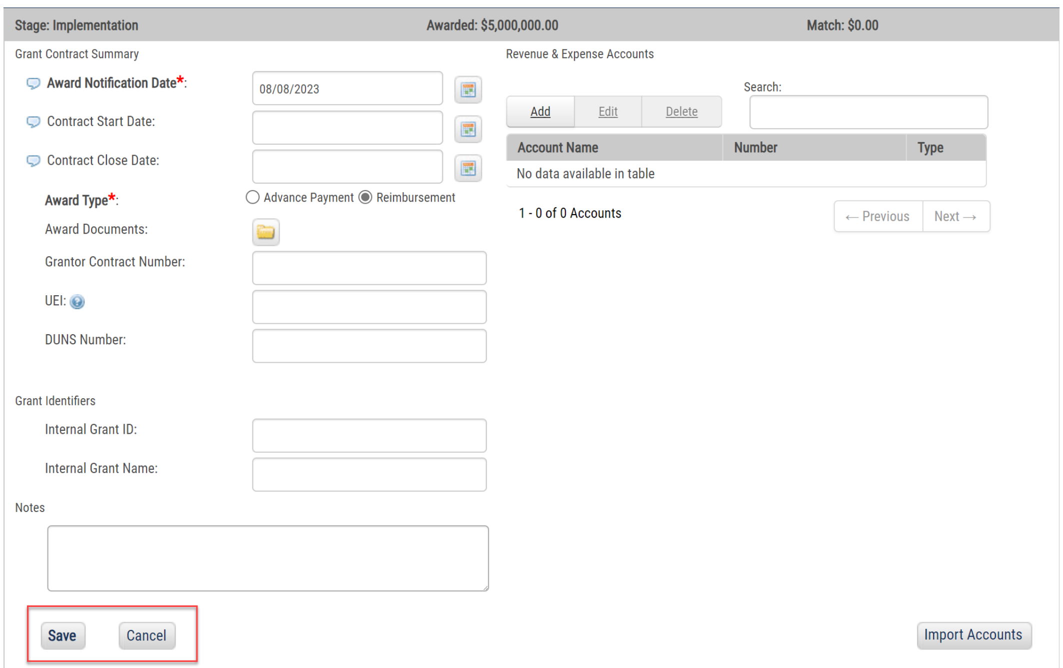
Editing Contracts & Accounts

This tab is only populated once a project and grant are at **Grant Awarded Stage**.

1) Select the *Edit button* Edit to enable changes to any of the fields. Agency eCivis users must never edit the Internal Grant ID.



2) Select the *Save button* Save ❯ or *Cancel button* Cancel ❯ to exit edit mode.



Project Dashboard Guide: Spending

Spending

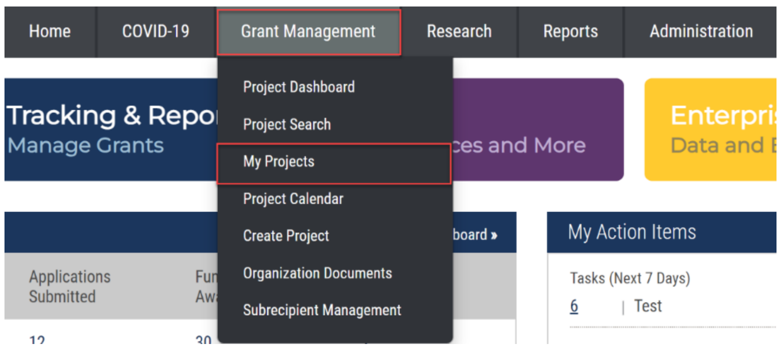
Associated with any *Scheduled Reports* where the Agency eCivis user indicates that the report is a *Spending Report*. However, PeopleSoft is the financial record for the State of Indiana, so any information reported as part of a *Spending Report* should be reconciled with PeopleSoft.

Appendix C – Creating Simple Tasks

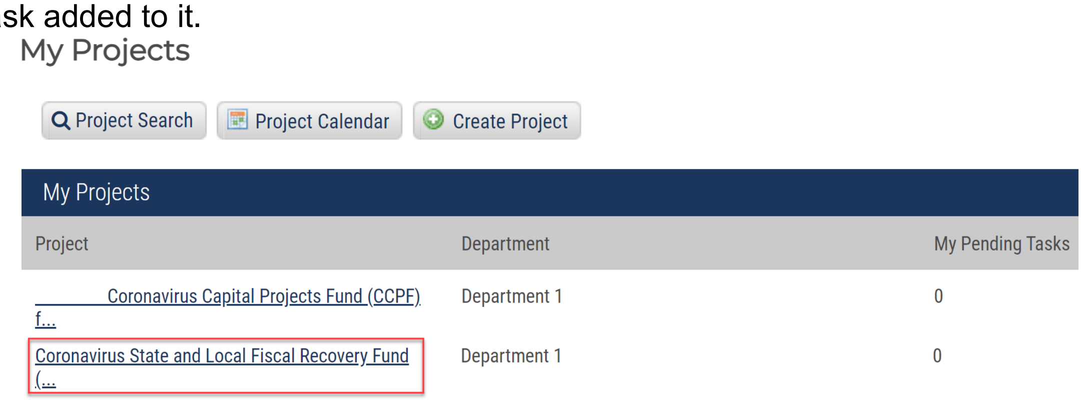
An Agency eCivis user can create tasks within eCivis Grants Network to align with the requirements of the funding and funder. These tasks can either be Simple or Advanced depending on the complexity of the task.

Utilize the Simple Tasks feature when setting up one-time reminders for project team members or ad-hoc requests and one-time reports from the funder. An example of this can be creating a reminder to set project and grant goals or metrics.

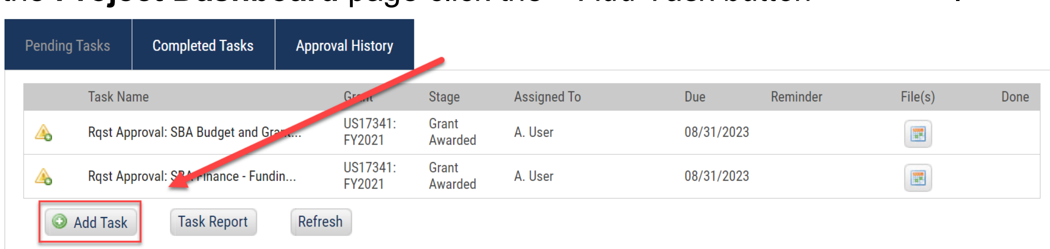
1) On the eCivis Grants Network Homepage, the Agency eCivis user will select *My Projects* from the **Grant Management** tab. From the list click on the name of the eCivis Grants Network project that will be updated.

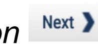


2) From the list click the name of the eCivis Grants Network project to have a Simple Task added to it.



3) On the **Project Dashboard** page click the + *Add Task button* .



4) Then select *Simple* and click the *Next > button* 

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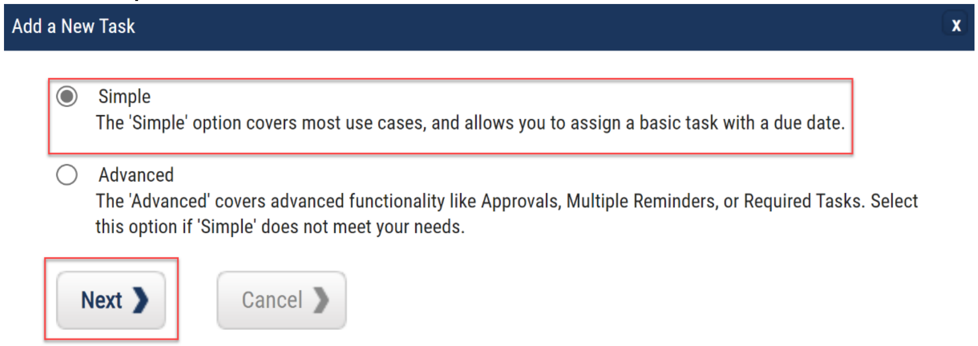
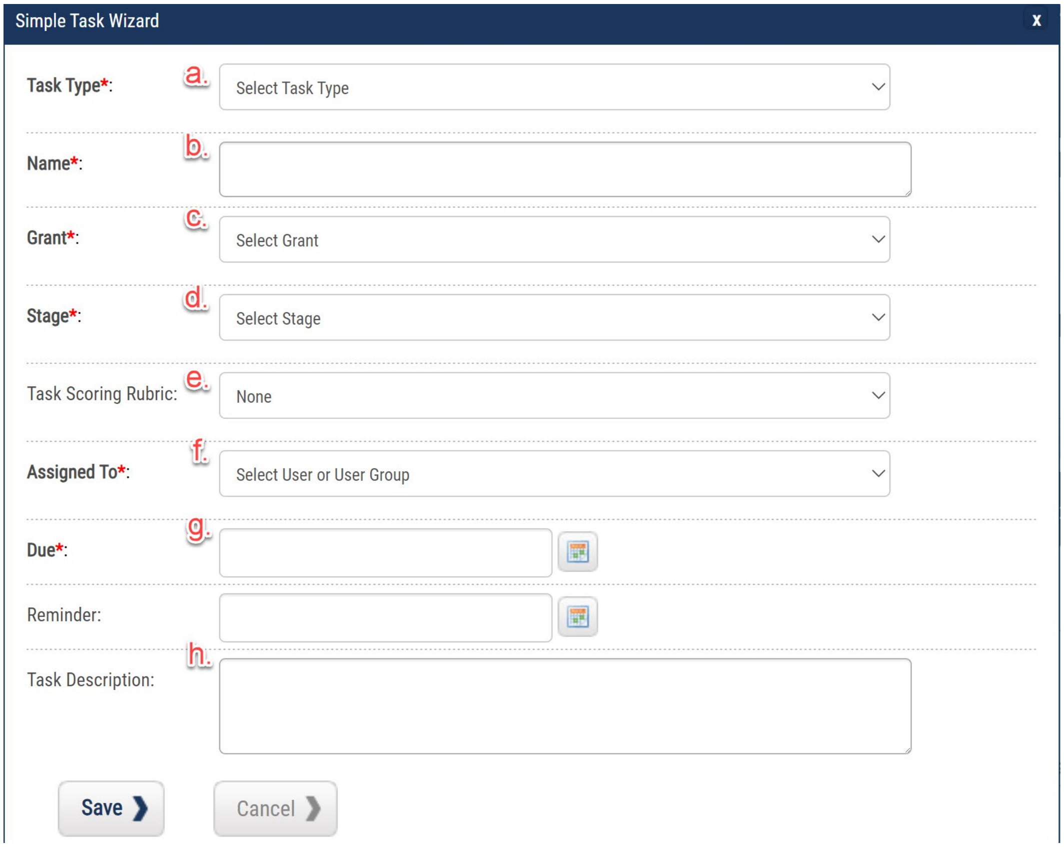


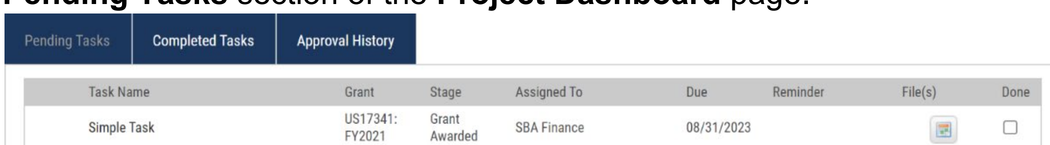
5) The Simple Task Wizard will appear, then complete the following required fields:
   a. **Task Type***:
      - *Miscellaneous Task* will be selected to create an immediate task.
      - *Scheduled Report* will only be available in post award grant stages (**Grant Awarded Stage**, **Implementation Stage**, and **Closeout Stage**) and should be chosen when using Simple Task for a funder or internal report task creation.
   b. **Name***: Enter a name for the task e.g., Set Project and Grant Goals.
   c. **Grant***: Select the grant to which the task applies.
      - Since there is one project to one grant, one grant to one project relationship for Indiana State Agencies within eCivis Grants Network, there will only be one grant listed to choose from here.
   d. **Stage***: Select the grant stage to which the task applies. For example, if the task is being created while a project is at the **Application Submitted Stage** (which is after the **Under Consideration Stage** and **Application Preparation Stage**), an Agency eCivis user will only be able to select the current stage, **Application Submitted Stage**, and those stages following it: **Grant Awarded Stage**, **Implementation Stage** and **Grant Closeout Stage**.

      NOTE: If the Agency eCivis user selected *Scheduled Report* for **Task Type*** and the current project and grant stage is **Grant Awarded Stage**, then the **Stage*** field will disappear, and the project and grant will move to the **Implementation Stage** once the task is saved.
   e. **Task Scoring Rubric**: Leave at default, *None*.
   f. **Assigned To***: Select the *Project Team* member or *User Group* to whom this task will be assigned.
   g. **Due***: Enter the due date for this task.
      - A **Reminder** can be set so the **Project Team** member or **User Group** assigned the task will receive emails from eCivis Grants Network starting on the **Reminder** date entered and continuing daily until the task is completed.
   h. **Task Description**: In the narrative box provide a brief description of the task and any additional guidance needed to complete the task.



6) Then click the *Save > button* 

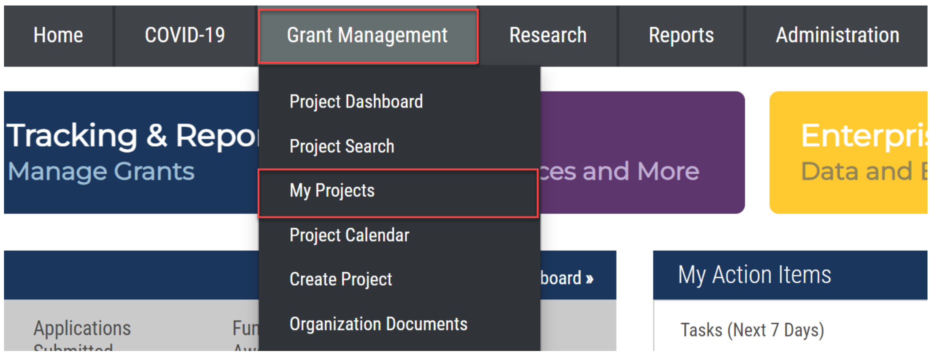
and the newly created Simple Task will appear in the **Pending Tasks** section of the **Project Dashboard** page.



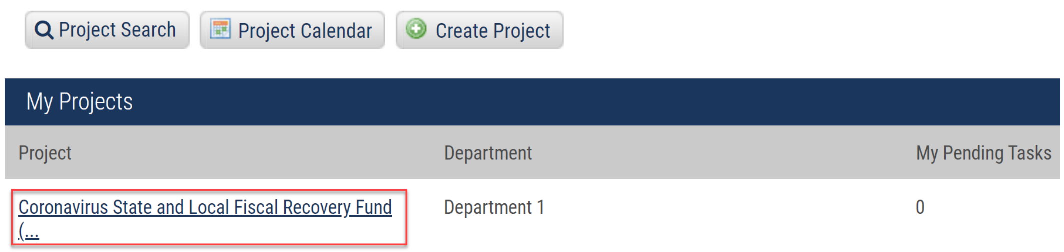
Appendix D – Creating Advanced Tasks

Utilize the **Advanced Task** feature when setting up recurring reminders or reports for **Project Team** members. An example of this can be setting reminders to set update progress on project and grant goals or metrics or quarterly financial and/or programmatic reports to the funder. For additional ways to manage the project and grant refer to [*Appendix B – Project Dashboard*].

1) On the eCivis Grants Network Homepage, the Agency eCivis user will select *My Projects* from the **Grant Management** tab.



2) From the list, click the name of the eCivis Grants Network project to have a Simple Task added to it.



3) On the **Project Dashboard** page click + *Add Task button* 

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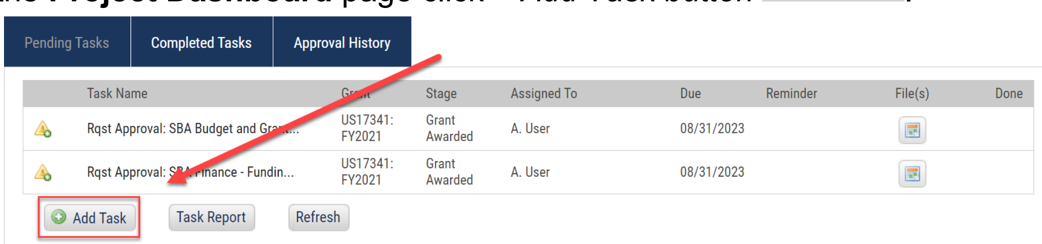

4) Select *Advanced* and click the *Next > button* 

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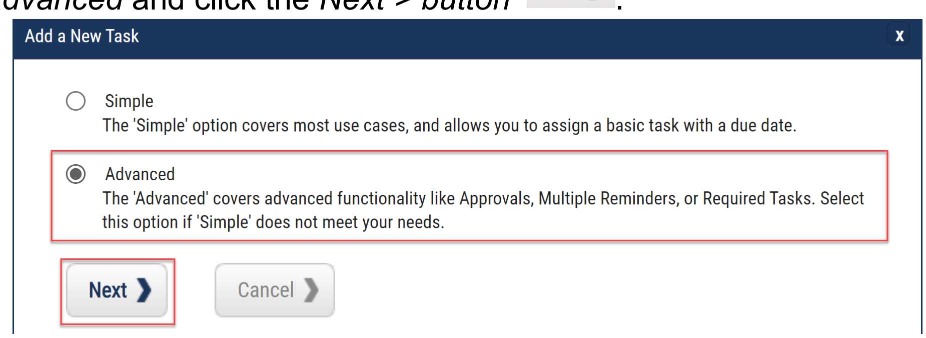
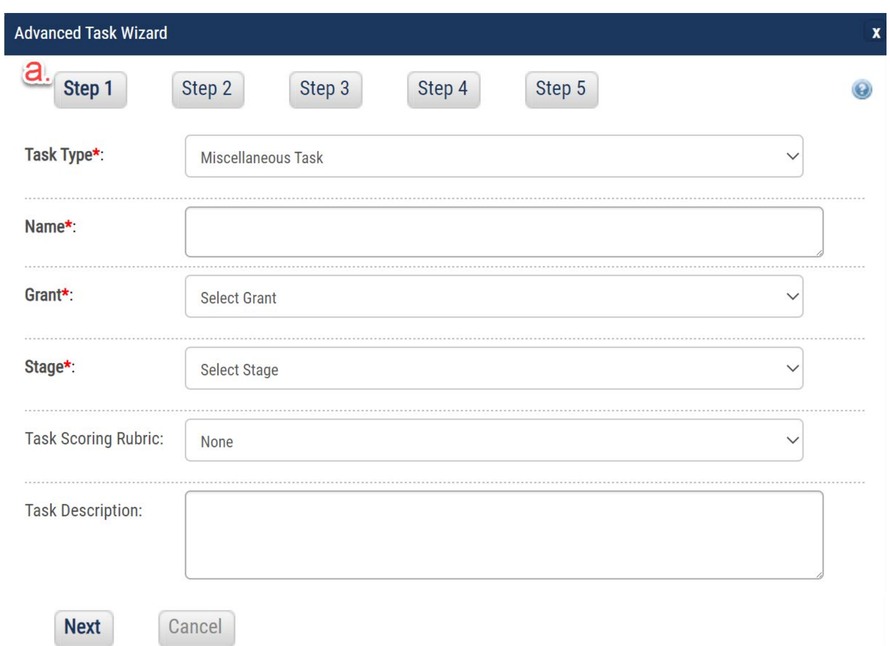


5) The **Advanced Task Wizard** window will appear:

   a. **Step 1**

   - **Task Type***:
     - *Miscellaneous Task* would be like the example provide, update progress on project and grant goals or metrics.
     - *Scheduled Report* will only be available in post award grant stages (**Grant Awarded Stage**, **Implementation Stage**, and **Closeout Stage**) and should be chosen when using Advanced Task for a funder or internal report task creation.
   - **Name***: Enter a name for the task, e.g., Update Progress on Project and Grant Goals.
   - **Grant***: Select the grant to which the task applies.
     - Since there is one project to one grant, one grant to one project relationship for Indiana State Agencies within eCivis Grants Network, there will only be one grant listed to choose from here.
   - **Stage***: Select the grant stage to which the task applies. At **Grant Awarded Stage**, an Agency eCivis user will only see the current stage, **Grant Awarded Stage**, and those stages following it, **Implementation Stage** and **Grant Closeout Stage**.

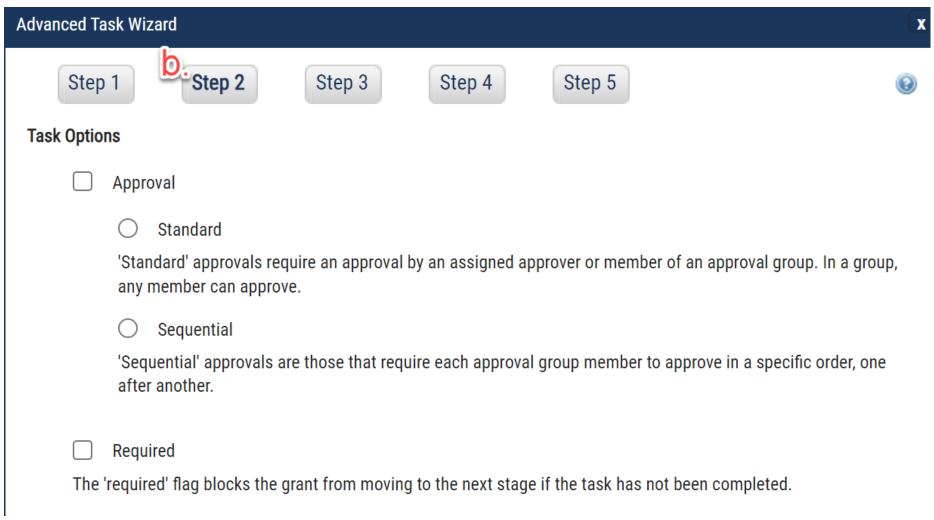
     NOTE: If the Agency eCivis user selected *Scheduled Report* for **Task Type*** and the current project and grant stage is **Grant Awarded Stage**, then the **Stage*** field will disappear, and the project and grant will move to the **Implementation Stage** once the task is saved.
   - **Task Scoring Rubric**: Not currently being utilized by SBA so leave at default, *None*.
   - **Task Description:** In the narrative box provide a brief description of the task and any additional guidance needed to complete the task.
   - Click the *Next > button* Next ❯.



b. **Step 2**

- If **Task Type*** from **Step 1** was *Miscellaneous Task* then the Agency eCivis user will see:
  - **Approval**
    - *Standard*: Requires approval by an assigned approver or member of an approval group. In a group, any member can approve.
    - *Sequential*: Requires each approval group member to approve in a specific order, one after another.
  - **Required** blocks the grant from moving to the next stage if the task has not been completed.
- If **Task Type*** from **Step 1** was *Scheduled Report*, then the Agency eCivis user will only see:
  - **Required** blocks the grant from moving to the next stage if the task has not been completed.
- Click the *Next > button* 

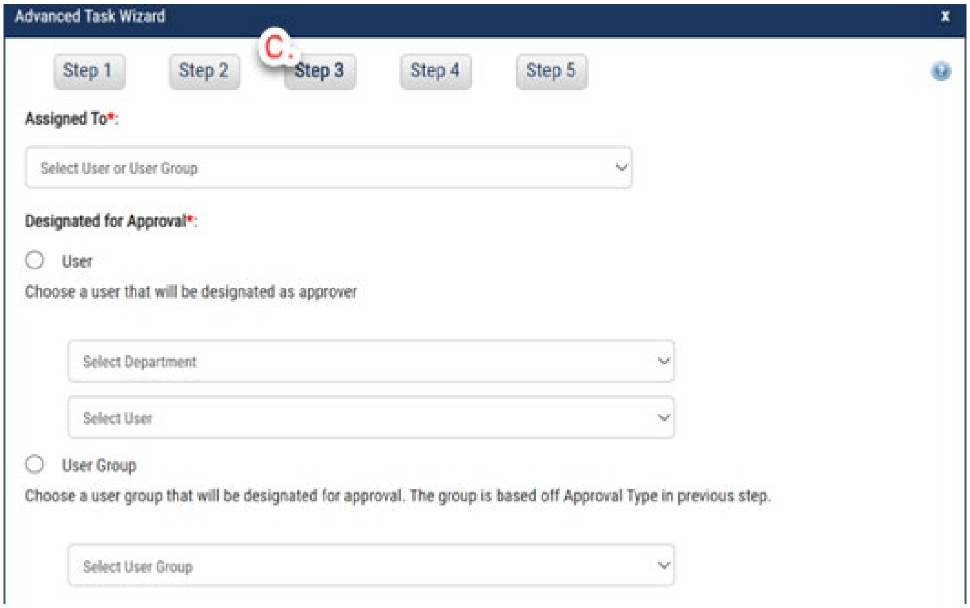
.



c. **Step 3**

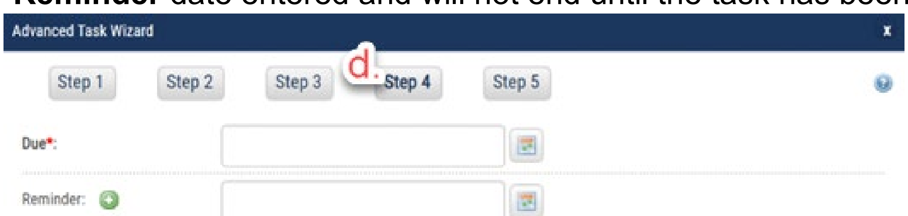
- If **Task Type*** from **Step 1** was *Miscellaneous Task* and *Approval* was selected for **Task Options** in **Step 2** then the Agency eCivis user will see:
  - **Assigned To***: Utilize the dropdown menu to assign the task to one of the *Project Team Members* or *User Groups*.
  - **Designated for Approval**: Select task approval option and use the dropdown menu to select the appropriate *User* or *User Group*.
- If **Task Type*** from **Step 1** was *Miscellaneous Task* and nothing was selected for *Approval* on **Task Options** in **Step 2** then the Agency eCivis user will see:
  - **Assigned To***: Utilize the dropdown menu to assign the task to one of the *Project Team Members* or *User Groups*.
- If **Task Type*** from **Step 1** was *Scheduled Report*, then the Agency eCivis user will only see:
  - **Assigned To***: Utilize the dropdown menu to assign the task to one of the *Project Team Members* or *User Groups*.
- Click the *Next > button* 

.



d. **Step 4**

- **Due***: Enter the due date for this specific task.
  - Add a **Reminder** for the **Assigned To*** Agency eCivis user. Again, the Agency eCivis user will start to receive emails regarding the task on the **Reminder** date entered and will not end until the task has been completed.



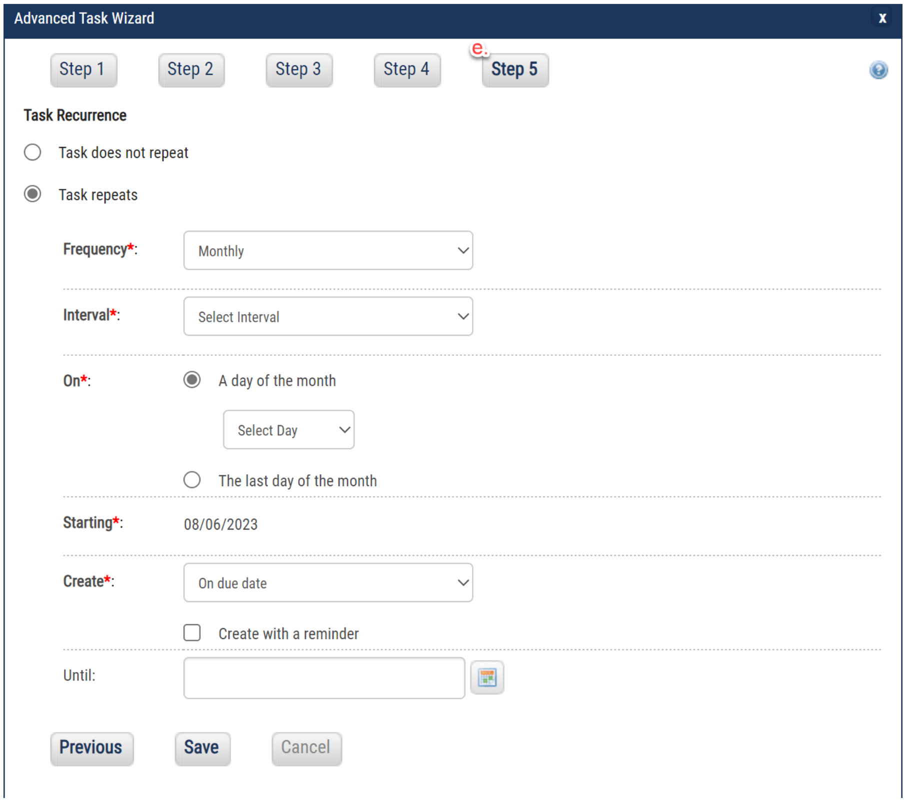
- Click the *Next > button* 
.

e. **Step 5**

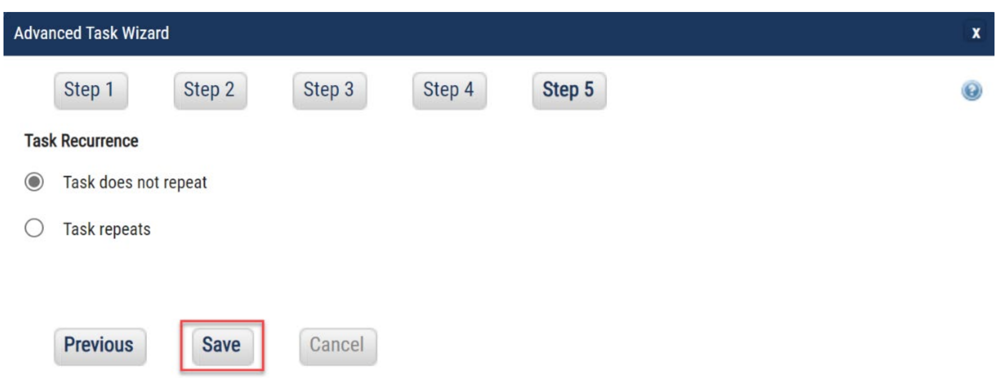
- **Task Recurrence**: Select the frequency in which this task will occur.
  - *Task does not repeat.*
  - *Task repeats:* If selected the following options will appear:
    - **Frequency***: Select either *Weekly* or *Monthly* from the dropdown menu.
    - **Interval***: A dropdown menu with weekly or monthly interval options depending on **Frequency** chosen, e.g., Every week, Every 2 weeks, Every month, Every 2 months, Every 3 months (quarterly), etc.
    - **On***: depending on **Frequency** chosen, either the days of the week will be listed for which day of the week the task repeats with one day needing to be selected or *A day of the month* with *Select Day* dropdown field or *The last day of the month* options for *Monthly* **Frequency**.
    - **Starting***: The previously specified **Due*** date will auto-populate in this field.
    - **Create***: Specify when this task will be created by eCivis Grants Network from the dropdown choices:
      - *On due date*

- *One week before the due date*
- *Two weeks before the due date*
  - Click the *Create with a Reminder checkbox* if the Agency eCivis user wants a reminder to start on the selected **Create*** date.

➢ **Until**: Enter the end date for this recurring task.



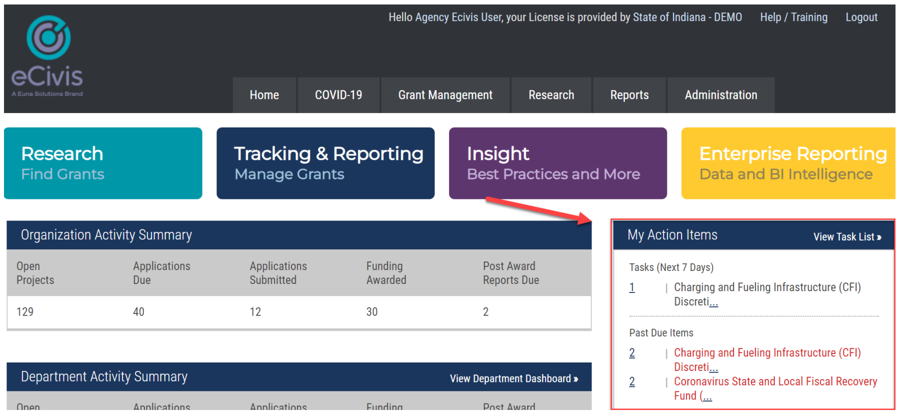
f. Then click the *Save button* **Save** to create the task.



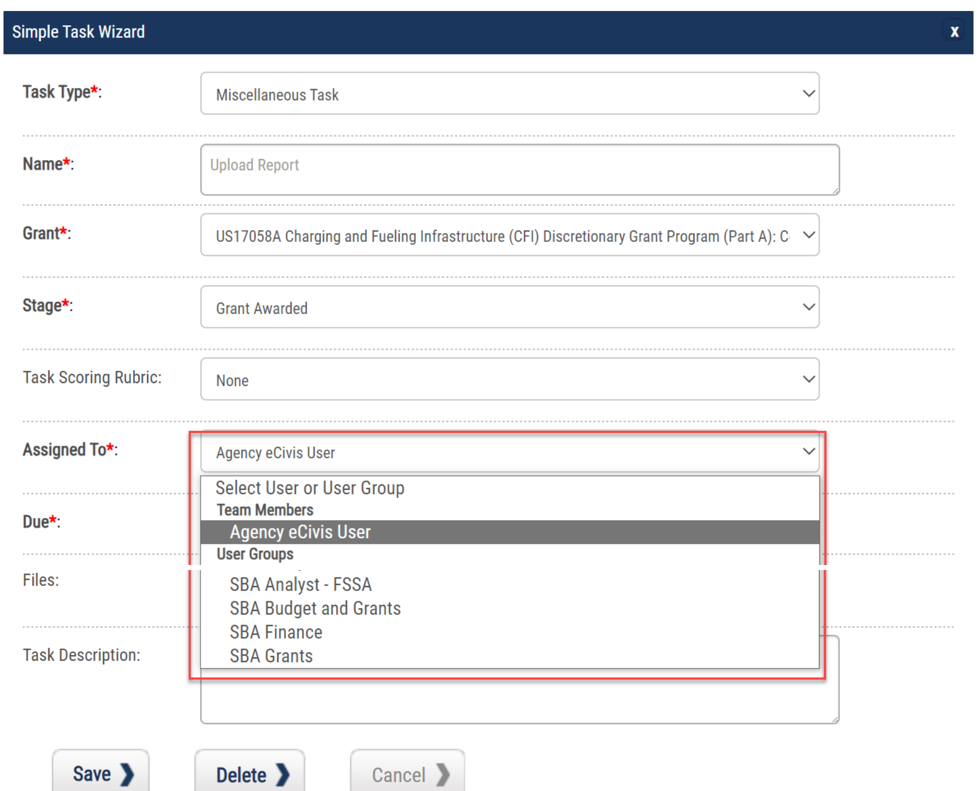
<u>NOTE</u>: Task settings may be edited at any time by clicking the **Task Name** under **Pending Tasks** and accessing the **Advance Task Wizard** to update and save any of the changes to the Steps.

Appendix E – Completing Pending Tasks

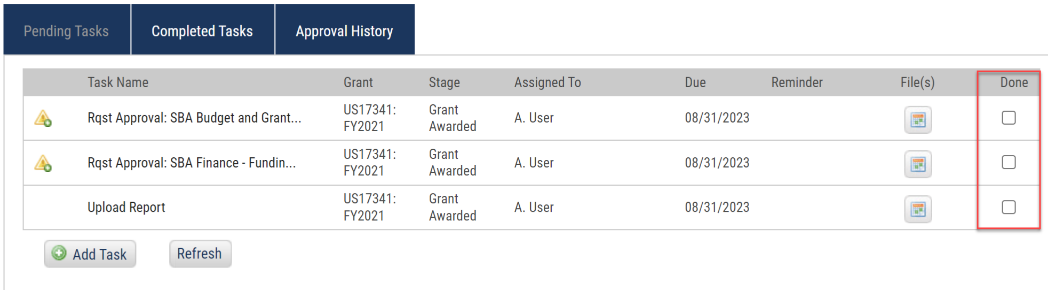
1) On the eCivis Grants Network homepage, the Agency eCivis user will see their pending tasks in the **My Action Items** section. Click on the Tasks number link which represents the number of tasks assigned to the Agency eCivis for the stated **Project Name**. This will navigate the Agency eCivis user to the **Project Dashboard** page of the selected Tasks number/**Project Name**.



2) On the **Project Dashboard** page, the **Pending Tasks** section will display all the tasks that are waiting to be completed. The **Assigned to** column will show the specific team member's name responsible for completing the task.
a. If the task must be re-assigned, click on the specific *Task Name* to open the **Simple/Advanced Task Wizard**, update the **Assigned To** field, and click the *Save > button*  once updated.



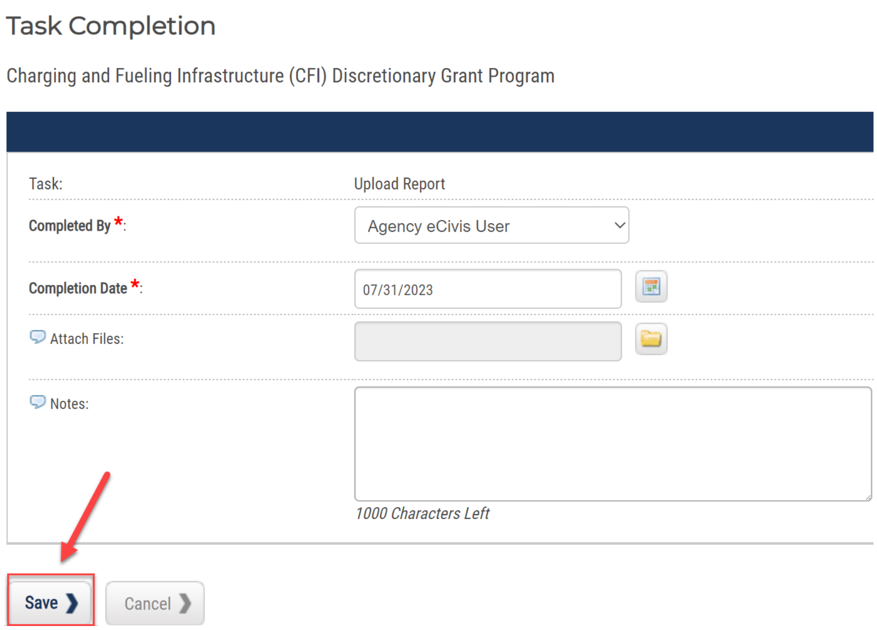
3) Once the task is assigned to the appropriate Agency eCivis user, that Agency eCivis user will click the *Done checkbox* to complete the task.



NOTE: Only the **Assigned to** Agency eCivis user will see the *checkbox* under the *Done* column. Otherwise, it will be blank for all other **Project Team** members.

4) The **Task Completion** form will appear and will vary based on the type of task.
   a. **Completed By*** is the **Project Team** member who completed the task. This will default to the **Project Team** member that is assigned the task.
   b. **Completion Date*** defaults to the date the task is being saved and should be left alone.
   c. **Attach Files** field allows Agency eCivis users to add any relevant documentation to support the task.
   d. **Notes** provides 1000 characters to provide any notes to support the task.

5) Once completed, click the *Save > button* .



Appendix F – Estimated Funding Source Guidance

The section specifies how Estimated Funding Sources are treated differently within eCivis Grants Network.

Automatic Tasks (SBA Analyst and SBA Finance)

- Send **Rqst Approval: 1. SBA Analyst - FS/Match/Subgrant** task
- Leave **Rqst Approval: 2. SBA Finance - FS (Funding Source)** task
    - This automated task stays put until *actually* get Grant Award

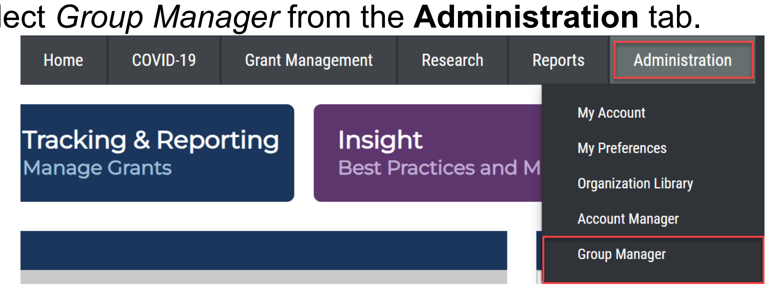
Create own "Estimated Funding Source Request" Approval Task to send for Estimate

- See Appendix D – Creating Advanced Tasks
- Attach previous year grant award
- SBA Finance replaces "n/a" with "estimate" or EST in the Internal Grant Name

Appendix G – Creating and Managing Approval Groups

This section describes how approval groups can be created to complete various tasks throughout the grant lifecycle. If multiple approvers are needed for a task, the Agency eCivis user must contact their Agency's Department Master Account Holder (DMAH) with detailed information to complete the following steps and create an approval group. Department-level Agency eCivis users will not have access to create/edit groups in the Group Manager feature of the eCivis Grants Network.

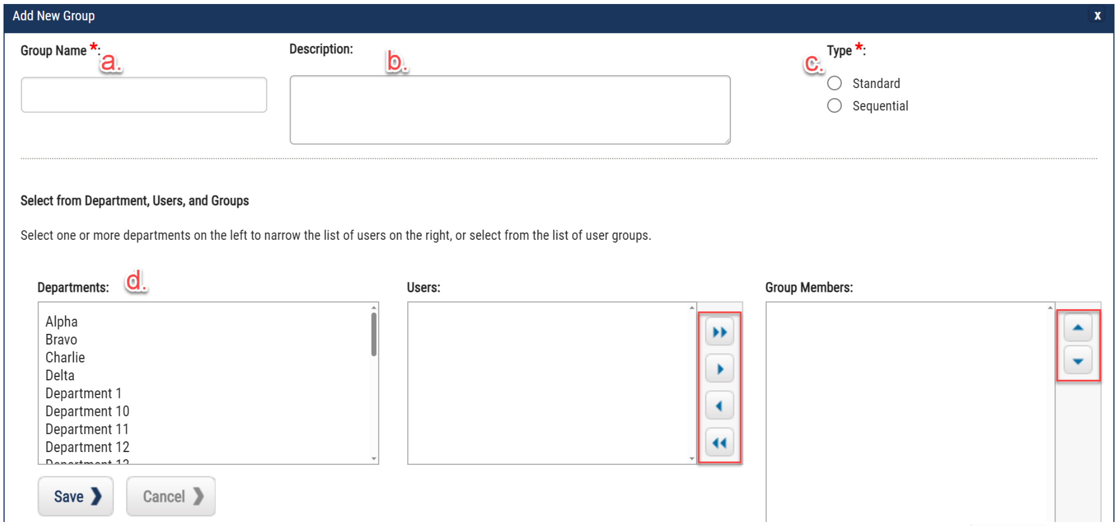
1) On the eCivis Grants Network Homepage, the Department Master Account Holder (DMAH) will select *Group Manager* from the **Administration** tab.



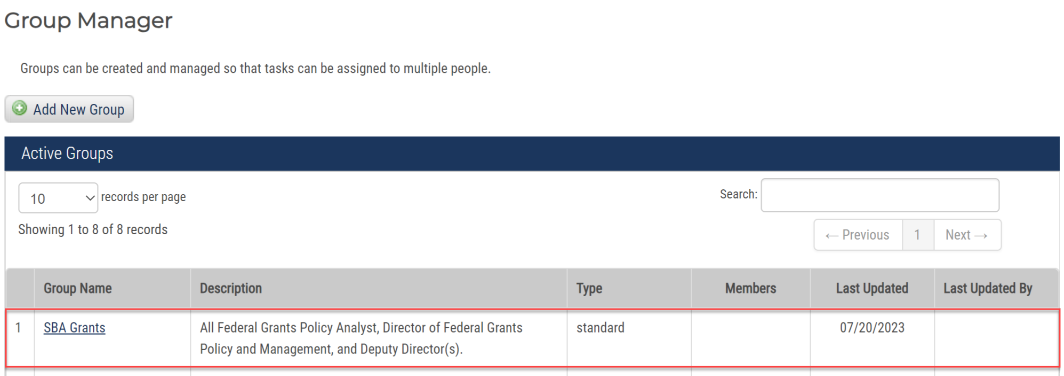
2) Then click the + *Add New Group button* 

to create a new user group in eCivis Grants Network.

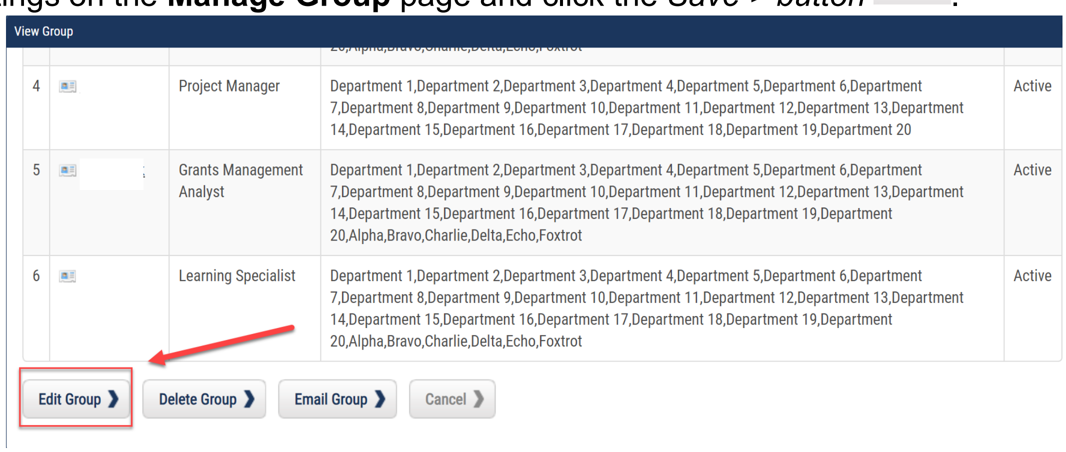
3) The **Add New Group** pop-up window will appear. Begin creating the new group by responding to the required fields.
   a. **Group Name***: Group names must include the following information with a dash between each (agency specific information can be found in Section 15 of State of Indiana eCivis Grants Network Policy and Procedures: Organization Funding):
      - 3-digit Indiana State Agency code (Business Unit)
      - Indiana State Agency Acronym
      - Division/Program Name
      - Function (i.e. Program, Finance, etc.)
         - Example: *057 – SBA - SLFRF - Finance*
         - See *Appendix G – State of Indiana Agencies, Acronyms, and BUs*.
   b. **Description**: Purpose or reason for the approval group &/or members in the group.
   c. **Type**:
      - *Standard:* Requires approval by an assigned approver or member of an approval group. In a group, any member can approve.
      - *Sequential*: Requires each approval group member to approve in a specific order, one after another. Note: The “request more information” function only requests more information from the previous approver. It does not allow you to request information from the **Project Team** member that the task was originally assigned to.
   d. **Select from Departments, Users, and Groups:** Utilize these menus to locate and assign specific individuals or groups to a new group.
      - Locate the Agency eCivis user by selecting the **Department** of the Agency eCivis user.
      - A list of Agency eCivis users within that **Department** will populate in the **Users** field.
         - If the **Type** is **Sequential**, additional **Groups** field will appear. This additional group field enables the Agency eCivis user to incorporate previously created groups into the new approval group.
      - Highlight *Users* or *Groups* and click the left and right arrow buttons to add or remove them from the **Group Members** list.
      - In the **Group Members** list, the up and down arrows can be used to determine the sequence of approval in a **Sequential** group. The selected *Users* or *Groups* at the top of the **Group Members** list will complete the first approval and then move down the list for the following approvals.



e. Once the new user group setup is complete, click the *Save > button* Save to return to the **Group Manager** page. The newly created group will appear in the **Active Groups** table and be accessible when assigning tasks on the **Project Dashboard** page.



4) To edit an **Active Group,** click on the *Group Name* and a **View Group** pop-up window will appear. Then click the *Edit Group > button* Edit Group to edit the group settings on the **Manage Group** page and click the *Save > button* Save.



a. If needed, a Department Master Account Holder (DMAH) can also *Delete Group* or *Email Group*.

Appendix H – State of Indiana Agencies, Acronyms, and BUs

State of Indiana Agency Naming Conventions	Acronym	Business Unit (BU)
IN Adjutant General	AGO	110
IN Alcohol and Tobacco Commission	ATC	230
IN Archives and Records Administration	IARA	062
IN Arts Commission	IAC	705
IN Attorney General	ATG	046
IN Board of Animal Health	BOAH	351
IN Bureau of Motor Vehicles	BMV	235
IN Civil Rights Commission	CRC	258
IN Commission for Higher Education	CHE	719
IN Criminal Justice Institute	CJI	032
IN Department of Agriculture	ISDA	036
IN Department of Child Services	DCS	502
IN Department of Correction	DOC	615
IN Department of Education	DOE	700
IN Department of Environmental Management	IDEM	495
IN Department of Health	IDOH	400
IN Department of Homeland Security	DHS	385
IN Department of Insurance	IDOI	210
IN Department of Labor	DOL	225
IN Department of Natural Resources	DNR	300
IN Department of Toxicology	IDT	115
IN Department of Transportation	INDOT	800
IN Department of Veterans Affairs	DVA	160
IN Department of Workforce Development	DWD	510
IN Destination Development Corporation	IDDC	037
IN Economic Development Corporation	IEDC	260
IN Family and Social Services Administration	FSSA	405, 410, 497, 498, 500, 501, 503
IN Governor's Council for People with Disabilities	GCPD	035
IN Governor's Workforce Council	GWC	512
IN Indiana Disability Rights	IDR	044
IN Integrated Public Safety Commission	IPSC	286

State of Indiana Agency Naming Conventions	Acronym	Business Unit (BU)
IN Law Enforcement Training Board	LETB	103
IN Lieutenant Governor’s Office	LG	038
IN Management Performance Hub	MPH	060
IN Office of Community & Rural Affairs	OCRA	038
IN Office of Energy Development	OED	266
IN Office of Management and Budget	OMB	055
IN Professional Licensing Agency	PLA	250
IN Prosecuting Attorneys Council	PAC	039
IN Protection and Advocacy Services Commission	PASC	044
IN Public Defender Council	PDC	610
IN School for the Blind and Visually Impaired	SBVI	550
IN School for the Deaf	SD	560
IN Secretary of State	SOS	040
IN State Budget Agency	SBA	057
IN State Library	ISL	730
IN State Police	ISP	100
IN Supreme Court	OJA	022
IN Utility Regulatory Commission	IURC	200
IN Veterans’ Home	VH	570

Appendix I – Updates to User Guide

<u>August 12, 2024</u>

- Section 3 – Automatically Assigned Tasks (Funding Source) *Task Descriptions updated*
- Section 7 – Create Substate Transfer Org Funding *modified*
- Section 8 – Program Income and Rebate Organization Funding *added*
- Definitions *moved prior to Appendixes*
- Appendix F – Estimated Funding Source Guidance *added*

<u>May 1, 2024</u>

- Section 7 – Create Substate Transfer Org Funding *modified*
- Section 8 – Program Income and Rebate Organization Funding *added*

<u>January 24, 2024</u>

- Section 4 - Automatically Assigned Tasks (Funding Source & Allot Ctrl) *title modified*

<u>October 20, 2023</u>

- Section 4 – Automatically Assigned Tasks *modified*
- Section 6 – Submit State Match Fund Request *added*
- Section 7 – Create Substate Transfer Org Funding *added*