State of Indiana eCivis Grants Network Grantor User Guide

Creating a Solicitation
November 2023

Contents

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.

Applicant – An individual or entity applying to a grant program.

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

Application Workspace – An Application Workspace is created for authorized Agency eCivis users to view and create their application and evaluation forms outside of any State of Indiana required fields for competitive solicitations It will also include the budget selected at solicitation, but it is not editable. The Application Workspace allows Agency eCivis users to identify application review team members, make application review assignments, and tabulate review results and scores. See also Solicitation and Zengine.

Approval Groups – Groups of State of Indiana employees responsible for approving tasks e.g., State Budget Agency (SBA) pursuance 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).

Assistance Listing – Formerly known as the Catalog of Federal Domestic Assistance (CFDA), it refers to the publicly available listing of Federal assistance programs managed and administered by the General Services Administration (GSA).

Assistance Listing Number (ALN) – A unique number assigned to identify a Federal Assistance Listing, formerly known as the CFDA number. See Assistance Listing.

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.

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.

Catalog of Federal Domestic Assistance (CFDA) Number – Now known as the Assistance Listing or Assistance Listing Number (ALN), it refers to the publicly available listing of Federal assistance programs managed and administered by the General Services Administration (GSA). eCivis will be updating the system to remove CFDA.

Configuration – The process of connecting the grant solicitation to the Application Workspace as a Grantor for competitive solicitations. This occurs when the Agency eCivis user clicks *Create App Workspace*. This requires eCivis technical support to assist with finalizing the process.

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.

eCivis – The software vendor that created eCivis Grants Network (Indiana State Agencies as Grantees/Grantors) and eCivis Grants 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.

Evaluator – The person responsible for reviewing and evaluating a grant application. An Evaluator may be a State of Indiana employee or an external party (non-State of Indiana employee). Reviewers do not need to have an eCivis Grants Network license/account. Also referred to as a Reviewer or Peer Reviewer.

Federal Award Identification Number (FAIN) – The unique identifier within the Federal agency for each financial assistance award.

Federal Fiscal Year (FFY) – The 12-month period the Federal government uses for financial or budgetary reporting. The FFY begins on October 1st and ends on September 30th. For example, FFY 2023 begins October 1, 2022, and ends September 30, 2023.

Financial Report (Payment or Reimbursement Request) – The task assigned to a Grantee or Subrecipient to submit financial data. Financial reports can also include payment or reimbursement requests within them. These reports are usually recurring in nature through the grant term.

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 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 Program – See Program.

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.

Grant Term – See Period of Performance.

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."

Indiana State Agency Lead – A State of Indiana employee in a leadership role within eCivis Grants Network. See Department Master Account Holder (DMAH).

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*).

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

Organization Funding – Funding opportunities that do not appear in the eCivis Grants Network Search for Grants feature will need to be entered manually as Organization Funding.

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.

Portal (eCivis Grants Portal) – The public-facing portal for Applicants of all Indiana State Agency grant programs released in eCivis Grants Network. URL: *https://portal.ecivis.com/#/login*.

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.

Program Income – Gross income earned by a non-Federal entity that is directly generated by a supported activity or earned because of the Federal award during the period of performance.

Program Manager – An Agency eCivis user that is the first Agency eCivis user to set up a Grantee project or solicitation (Grantor).

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.

Reviewer – See Evaluator.

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).

State Fiscal Year (SFY) – The 12-month period the State of Indiana uses for financial or budgetary reporting. The SFY begins on July 1st and ends on June 30th.

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.

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) pursuance approval or financial reports with/without payment/reimbursement requests from Subrecipients.

Workspace – See Application Workspace and Zengine.

Zengine – The third-party tool used for the configuration of online applications, application review forms, assignment of reviewers to applications, and online review and scoring of submitted grant applications. This is also referred to as the Application Workspace.

Purpose

The purpose of this user guide is to provide instructions to Agency eCivis users on creating a solicitation to accept grant applications.

These steps will allow Agency eCivis users to 1: complete the initial setup of locating the funding source, 2: create approval groups, 3: create and edit their solicitation, and 4: publish a solicitation to create an Application Workspace.

Step 1: Locate a Source of Funds for the Solicitation

This initial step locates and sets up the source of funding that will be utilized in the Grantor solicitation. The source of funding must be attached to an active eCivis Project in the Grantee system and must be made available for pass-through funding as indicated in the *State of Indiana User Guide: Grantee Award Management*.

Complete the following steps for all funds to be used in a solicitation:

1) On the eCivis Grants Network Homepage, the Agency eCivis user will select *My Projects* from the **Grant Management** tab.
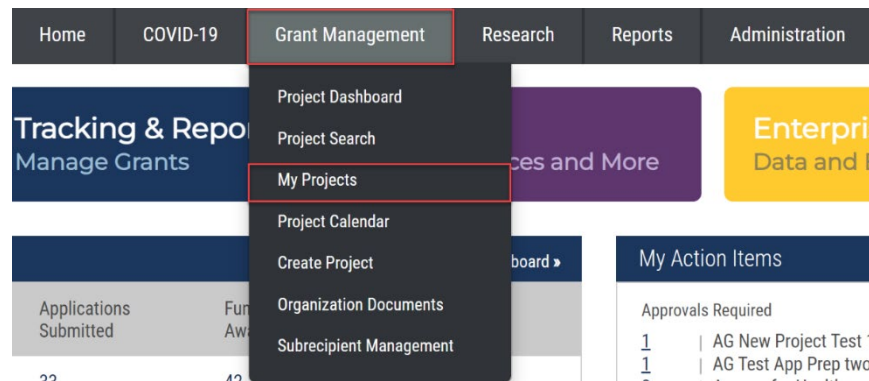
2) From the list, click the name of the eCivis Grants Network project to be used as the source of funding for the solicitation.
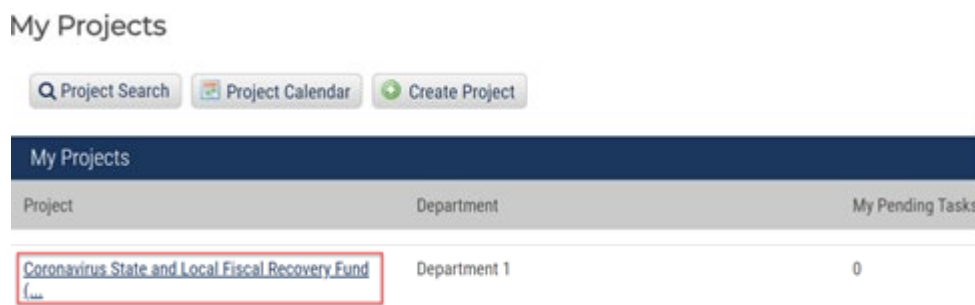
3) On the *Project Dashboard*, the Agency eCivis user will select the **Grant Lifecycle** tab:

4) The Agency eCivis user will click on the *Pencil Icon* 🖉 for the *Grant Awarded* Stage*:

NOTE: If an amendment was processed for the Project, the Agency eCivis user will click on the *Pencil Icon* 🖉 for the *Grant Amendment* Stage.

5) A Grant Status form will appear; to prepare the eCivis Project for solicitation, the Agency eCivis user will scroll down to the **Allocation Option** section and select *Yes* to **Are awarded funds to be available for use as pass-through funding?***

The Agency eCivis user should enter the **Amount to earmark for pass-through funding*** that will be distributed in their grant program.

NOTE: All State of Indiana Agencies must select "No" to **Are awarded funds to be available for Allocation to sub-projects? *** as sub-projects will not be used in eCivis.

6) The Agency eCivis user should click the *Save > button* to proceed.

7) Repeat the above steps for additional funding sources.

Step 2: Create/ Manage Approval Groups for the Solicitation

In this step, approval groups can be created to complete various tasks throughout the grant program lifecycle. The following **Task Types** and their descriptions are found in the Grantor solicitation's **Approval** section.

For each Task Type below, the description outlines when an approval workflow is triggered:

a. **Recommendation Approval**: an award recommendation has been created.
It occurs before the applicants notified of their award offer.

b. **Final Award Approval**: an award has been accepted by an applicant.
This is the final approval before the award is considered awarded.

c. **Activity Report Approval**: an activity report has been submitted by a subrecipient.

d. **Financial Report Approval**: a financial report has been submitted by a subrecipient.

e. **Amendment Approval**: a subrecipient requests a grant amendment.
If selected, this workflow can also be used for financial amendments without changes to the award amount.

f. **Amendment Approval with Finance**: a subrecipient requests a grant amendment with changes to the award amount.

g. **Grantor Amendment Approval**: an Agency eCivis user initiates the amendment for the subrecipient.

h. **Grantor Amendment Approval with Finance**: an Agency eCivis user initiates the amendment for the subrecipient with changes to the award amount.

i. **Grantor Amendment Final Approval**: this final approval initiated by an Agency eCivis user for the subrecipient with changes to the award amount.

j. **Return of Funds Approval**: a subrecipient request to give back a portion of their award amount as unused funds.

k. **Closeout Approval**: the closeout process is triggered by a subrecipient.

1) After reviewing each task, the Agency eCivis user should determine the approval workflow for each and decide whether each task will need one or multiple approvers.
   a. If only a single approver is needed, skip to *__Step 3: Create the Public Solicitation__*.
   b. If multiple approvers are needed for a task, the Agency eCivis user <u>must</u> contact their Agency's Department Master Account Holders (DMAH) with detailed information to create an approval group. Department-level Agency eCivis users will <u>not</u> have access to create/edit groups in the **Group Manager** of eCivis Grants Network.

2) On the eCivis Grants Network homepage, the Agency's DMAH will click Group Manager from the **Administration** tab.
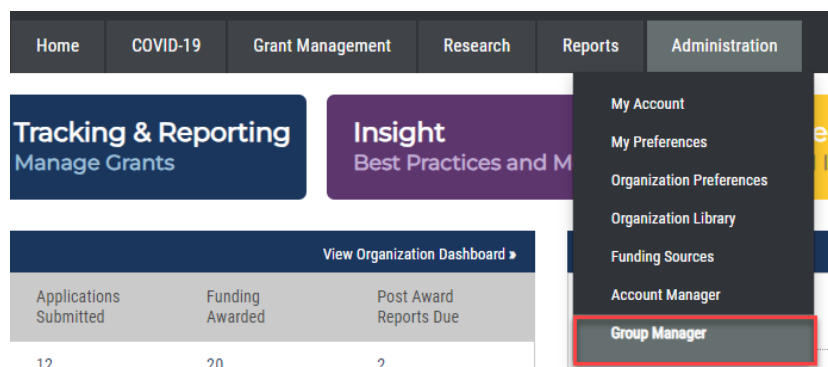
3) Click the *+Add New Group button* ⊕ Add New Group and enter the required information indicated with a red asterisk (*).

a. **Group Name***: Group names are <u>required</u> to include the 3-4 letter Indiana State Agency acronym at the start of their name.

Additional elements to include in the group name include:
- The term "Grantor"
- Program Name/ Grant Name
- Function (i.e. Programmatic, Financial, etc.)
  - Example: *SBA Grantor SLFRF Financial*
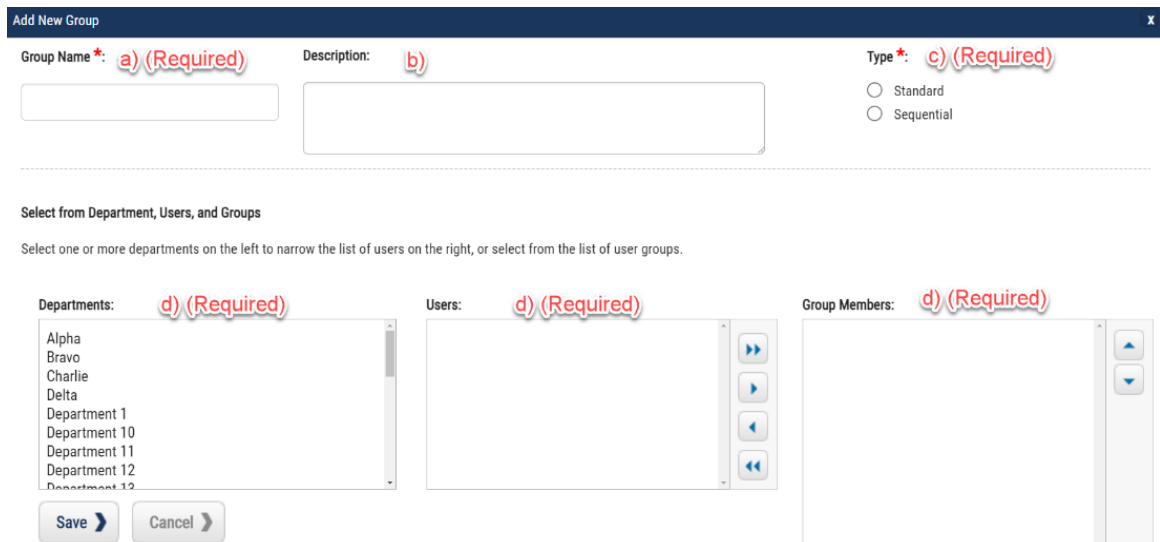
b. **Description**: Purpose or reason for the approval group and/or its members.

c. **Type***:
- *Standard:* All group members will receive notification via email, simultaneously, and any individual approver within that group may complete the task.
- *Sequential:* Group members will be notified to complete the task in a sequence determined in the Group Manager settings.

d. **Select from Department, Users, and Groups**:
- Select the **Department** of the Agency eCivis user.
- A list of Agency eCivis users within that Department will appear in the **Users** field.
  - If **Sequential** was previously selected, an additional **Groups** field will appear. This will enable the Agency eCivis user to incorporate previously created groups into the new approval group.
- Select *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 group or user at the top of the Group Member list will complete the first approval and then move down the list for the approvals that follow in the sequence.

4) Once the approval group is created, click *Save > button* Save ▶ .
   Repeat the above steps to create additional approval groups.

Step 3: Create the Public Solicitation

Once the source of funding is set up in a Grantee project and made available for pass-through funding, the Agency eCivis user can proceed to create the Grantor solicitation.

1) From the eCivis Grants Network homepage, under the **Grant Management** tab, the Agency eCivis user will select *Subrecipient Management*.

2) The **Program Dashboard** page will appear showing a complete list of all previously created solicitations. At the top of the page, the Agency eCivis user should click the *Add New Program button* Add New Program .
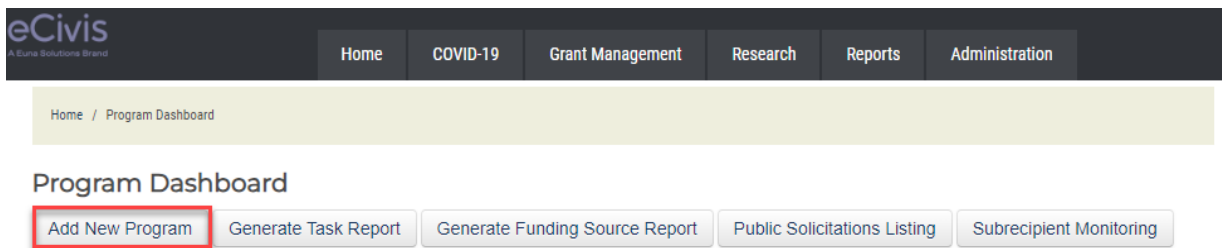
3) A **Create New Program** window will appear, and the Agency eCivis user will fill in the required information:

    a. **Program Name**: This name will appear internally/externally and can be revised if needed. Include the fiscal year at the end, like how eCivis Projects are named.

    b. **Solicitation Type**: Using the dropdown menu, the Agency eCivis user will select one of the following options to create their solicitation.

- *Direct Award Process* will not require applications to award grant funds. (i.e., formula & non-competitive grants")
- *Application and Peer Review Process* will require applications to be created and reviewed prior to being awarded grant funds. See Evaluator in [Definitions](#).

    c. **Department**: Using the dropdown menu, the Agency eCivis user will select the Department that will be managing the Program. The Agency eCivis user will only have access to the Department(s) they are associated with in the Grantee system.

    d. **Template Application**: If the **Application and Peer Review Process** is selected as the solicitation type, click the dropdown menu to select the *SOI Simplified Program Application* template.

    e. **Listing**: The Agency eCivis user will select the solicitation listing type by selecting either *Public* or *Private*.

- *Public* listings will appear on eCivis Grants Network's Public Solicitations Listing page, which the State of Indiana displays on its website for others to select an available program and apply. (For example, it is visible on the public-facing [State Agency Grant Opportunities website](#).)
- *Private* listings will <u>not</u> appear on eCivis' Public Solicitations Listings page and can only be accessed by providing your applicant a direct link to your solicitation.

    f. **Subprogram**: The Agency eCivis user should select *No* in response to whether the program solicitation is a subprogram, as the State of Indiana is not utilizing subprograms.

4) The Agency eCivis user will click the *Create Program button* [Create Program].
   NOTE: if "Create Program" is not visible, try Zooming out on the internet browser.

5) The Program Detail page will appear; click the *Edit Solicitation button* [Edit Solicitation].

> Program Detail
> **Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF)** [Draft]
> Department: Department 1
> Total Funding: $0.00
> Application Period: N/A
>
> [Subrecipient Reporting ▾] [Edit Solicitation] [Publish Solicitation] [Delete]

6) The **Edit Solicitation** page will be displayed, prompting an Agency eCivis user to provide the required information to complete each section of the solicitation. Initially each section header will be marked with an *X* ❌ indicating that it is incomplete; once completed and saved, all tabs must appear with a *checkmark* ✅ to publish a solicitation.

> [Overview ✔] [Eligibility ❌] [Financial ❌] [Contact ❌] [Files ❌] [Review ❌] [Submission ❌] [Goals ❌] [Approval ❌]
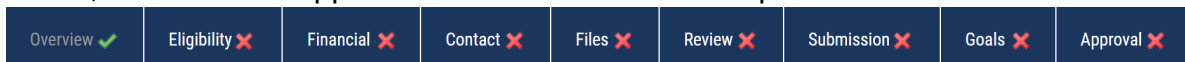
   NOTE: Only the first 5 tabs will be visible to applicants in the external solicitation. Additionally, the Review tab will only appear when the *Application and Peer Review Process* Solicitation Type was selected.

7) **Overview**: The Agency eCivis user should enter the information requested in this tab. Please note the required fields indicated with an (*) must be provided.
   a. **Title***: Grant program name.
   b. **Fiscal Year**: Enter the applicable State Fiscal Year (SFY) or Federal Fiscal Year (FFY) for the program.
   c. **Application Start Date**: The first date that the Agency eCivis user's Department is accepting applications.

   NOTE: Checkmark Apply button: [✔ Apply] will appear for a solicitation on the date entered here. This is linked to the **Time Zone** within the **Organization Preferences** established by SBA. This cannot be changed except by SBA.

   d. **Application End Date**: The last date that the Agency eCivis user's Department is accepting applications.

   NOTE: This is the date that *Checkmark Apply button* [✔ Apply] will disappear from the solicitation at 11:59:59PM EDT, and applicants can no longer apply. Again, the exact time cannot be changed here.

   However, an Agency eCivis user can change the specific time for the solicitation to end with the removal of the *Submit button* [Submit] from the **Portal** (see Definitions). This is done once the Agency eCivis user has access to the **Application Workspace** which occurs after this process, solicitation creation, and the solicitation published. (NOTE: Agency users can also put this information in the Submission tab of the solicitation and eCivis will make the updates in Zengine.)

Therefore, in the **Summary***, the Agency eCivis user should restate the date and exact time applications are accepted including time zone. The Budget Agency recommends that solicitations end no later than 4 pm to align with business hours.

 e. **ID**: Any other grant program identifier.
 f. **CFDA/ALN**: Catalog of Federal Domestic Assistance number, if applicable (Assistance Listing Number).
 g. **Reference URL**: Option to provide a link to a website for the grant program, if available. Otherwise this field will remain blank.
 h. **Listing Availability***: Public or Private.

 i. **Summary***: Provide any narrative information that is appropriate regarding the grant program such as its purpose. This is the main block of text applicants will view on the [Grant Opportunities] prior to selecting the *Apply button* ✔ Apply .

  NOTE: Restate the date and exact time including time zone that applications are accepted based on the **Application End Date**.

 j. The Agency eCivis user should click the *Save > button* Save ❯ once this section is complete, then proceed to editing the next section.

 NOTE: All the information above, a. - j. will be visible to the applicant.

8) **Eligibility**: The Agency eCivis user should enter the information requested in this tab. Please note that the required fields indicated with an (*) must be provided.
 a. **Eligible Applicants***: Select all that apply.
 b. **Eligibility Notes***: Provide any additional eligibility information that may assist applicants with determining if they are eligible and/or their projects are eligible.

 c. The Agency eCivis user should click the *Save > button* Save ❯ once this section is complete, then proceed to editing the next section.

NOTE: All this information will be visible to the applicant.

9) **Financial**: The Agency eCivis user should enter the information requested in this tab. Required fields indicated with a *red asterisk* (*) must be provided.

   a. **Total Funding***: In this section, the Agency eCivis user will begin by adding the eCivis Grants Network funding source(s) to the solicitation.

   1. The Agency eCivis user will click the *Add Funding Source button* [Add Funding Source]. The **Add Funding Source** pop-up window will appear.
      - **Choose Funding Type***: The Agency eCivis user will click the dropdown menu to select either *Pass-Through Funding* or *Organizational Funding Source*. Based on their selection, additional dropdown menus will appear to help locate the funding for allocation.
        - *Pass-Through Funding*
          - **Select Department**
          - **Select Project**
          - **Select Grant**
        - *Organizational Funding Source*
          - **Select Funding Source**
      - **Total Available**: This field will populate with the funding source's total funds available for allocation, or pass-through funding.
      - **Total Allocation**: In this field, the Agency eCivis user will enter the amount of funds to be allocated in this solicitation. The Agency eCivis user cannot over-allocate.
   2. Once all required information is entered, click the *Save Funding > button* [Save Funding].
      - If additional eCivis Grants Network funding sources will be used for this solicitation (multiple funding sources will be awarded to applicants in this grant program), repeat the steps above in 9) Financial before proceeding.
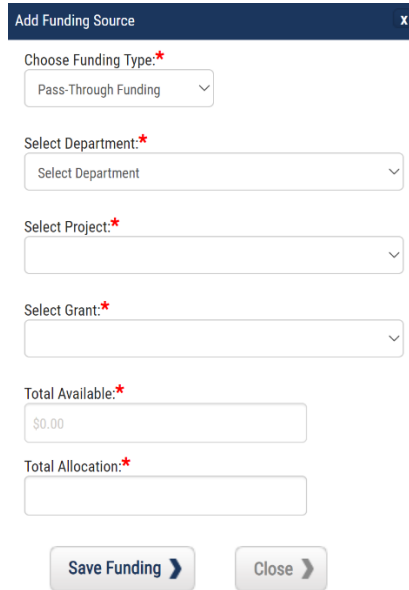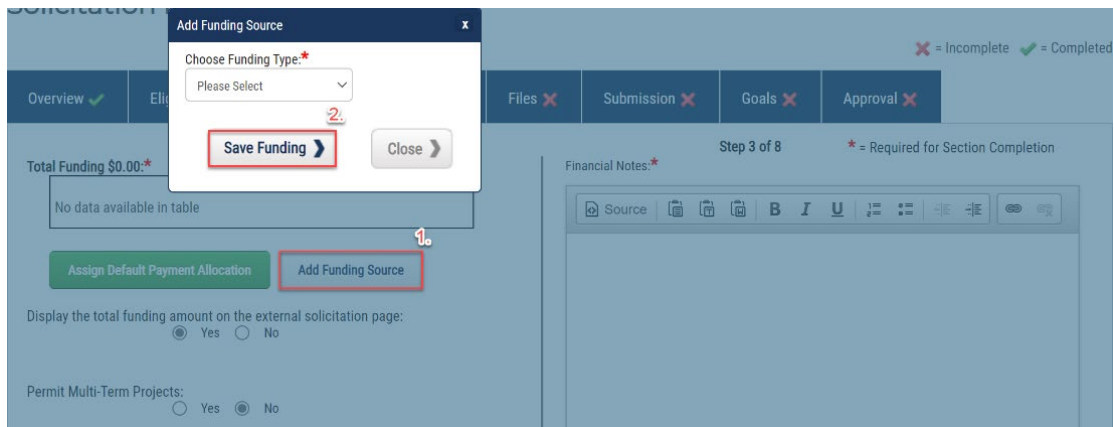
b. Once the eCivis funding source(s) is added, click the *Assign Default Payment Allocation button* Assign Default Payment Allocation .
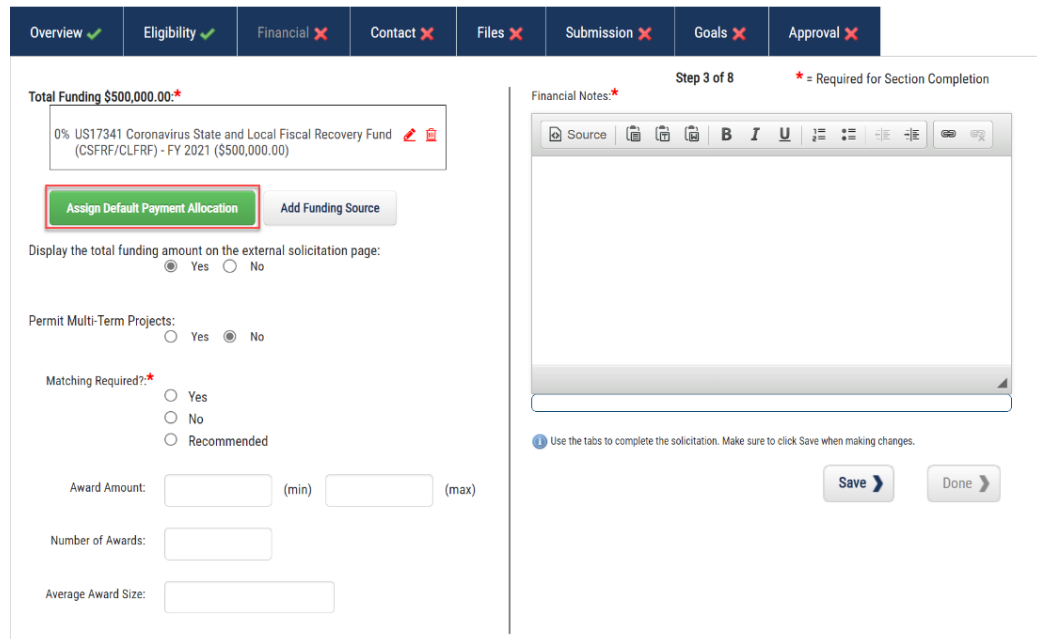
c. **Funding Source Default Payment Spread**: If this program is utilizing multiple funding sources, the Agency eCivis user may enter the percentage for each default payment for each funding source(s) and click the *Save > button* Save ❭ .

NOTE: If there is only one Funding Source, the Agency eCivis user will input "100%". This percentage/breakdown can be updated when submitting a financial report.

d. Select or enter a response to the following questions:
   - **Display the total funding amount on the external solicitation page**: *Yes* or *No*
     - This will display the amount entered from the **Total Allocation** in the Financial section.
   - **Permit Multi-Term Projects**: *No*
     - The State of Indiana is not tracking multi-year budgets.
   - **Matching Required?***: Yes/No/Recommended
     - If *Yes* or *Recommended* is selected, a dropdown menu will appear and the Agency eCivis user must select the **Matching Type** which has a dropdown menu of *Cash, In-Kind, or Cash/In-Kind*.
   - **Award Amount**: *Minimum (min)* and *Maximum (max)*
     - An Agency eCivis user can select to enter both a min and max, or just one of these, to inform the applicants.
   - **Number of Awards**: If no data is entered, it will appear as "N/A" in the external solicitation.
   - **Average Award Size**: If no data is entered, it will appear as "N/A" in the external solicitation.
   - **Financial Notes***: An Agency eCivis user can provide more information as it relates to the eligible, allowable costs (or non-allowable costs) along with any other information as it pertains to the data fields populated in this section e.g.—while the Award Amounts minimum and maximum were stated, the agency will consider projects and awards outside of those parameters.
   - ***Click Save**.

NOTE: All this information will be visible to the applicant.

10) **Contact**: Enter the information requested in this tab. Required fields indicated with a *red asterisk* (*) must be completed. The information provided below is visible to the applicant and can be used to contact the grant program manager/office with questions.

    a. **Agency Department**: The Indiana State Agency selected when initiating the solicitation will automatically appear here.

    b. **Contact/Help***: The email address entered here will be visible to the public and will be the default email recipient of communication on this solicitation.

    c. **Office**: If necessary, enter a specific office within an Indiana State Agency.

    d. **Program Contact***: Enter contact information for the Program Manager or other point of contact.

    e. **Application Address***: Enter the application address if it does not match the Program Contact information previously provided.

    f. **Contact Notes***: Add any additional contact notes necessary for applicants.

NOTE: All this information will be visible to the applicant.

11) **Files**: Enter the information requested in this tab as appropriate.

   a. **Current Files**: Click the *Add File > button* [Add File >] to upload any supplementary documents that will be needed by applicants during the application submission process. Some examples include:
- Notice of Funding Opportunity (NOFO)
- Frequently Asked Questions (FAQs)
- Agency eCivis User Guides
- Additional budget or financial spreadsheet
- Select appropriate File Label from the drop-down menu:
     NOFA, Application, Budget, Guide, FAQ, Other.

   b. **Application Submission Notes**: Include details about how to apply, what information to include, and any additional information to communicate to applicants.

   c. **File Notes**: Provide details or instructions about the use of each file included.

   d. Click Save.

NOTE: All the information above will be visible to the applicant.
All tabs after this will not be visible to the applicant and will be used to configure the program in eCivis' Grants Network.

12) **Review**: Enter required fields to add reviewers to the program's Review Committee.
NOTE: This team may be updated later, if needed.

   a. **Review Committee**: Click the *Add Reviewer > button* to begin creating your committee.

b. The **Add Reviewer** pop-up window will appear and require the following:
    - **First Name***
    - **Last Name***
    - **Email***

NOTE**:** Agency eCivis users and external users may be added as a Reviewer in the Review Committee. See Evaluator in [Definitions](#).

c. Click the *Add Reviewer > button* once completed. If additional reviewers must be added, repeat the steps above as needed. Once this step is completed, click the *Save > button* to proceed.

NOTE: Review notes section for eCivis.

13) **Submission**: This tab is not visible to the applicant and will allow configuration of settings within the submission and subrecipient portals. Complete required fields (*).
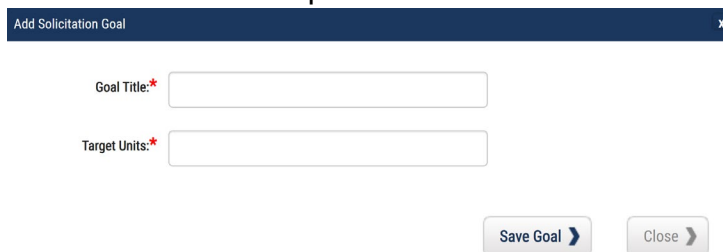
a. **Primary Workspace Email*:** This email address will receive the initial invitation to the Application Workspace. Once the invitation is accepted, this individual can proceed to invite other team members as needed.

b. **Accept multiple applications per user***: *Yes* or *No*
NOTE: This selection cannot be changed once the solicitation is published.

c. **Budget Development***: *Yes* or *No*

d. **Budget Template**: Select a budget option from the dropdown menu.
   - *SOI Construction Budget*
   - *SOI Program Budget*

NOTE: This selection cannot be changed once the solicitation is published.

e. **Contract Number***: Select *No* and do not allow the **Contract Number** to be autogenerated by the system. The contract number will be entered manually by the Agency eCivis user at the **Award Recommendation** stage.

f. **Collect Detailed Financial Reports**: Checkbox; A budget selection is required. *This selection cannot be changed once the solicitation is published.*

g. **Detailed Financial Report Options**: The Budget Agency suggests not selecting the "collect detailed financial reports" option.

h. **Require Invoice Number on financial reports**: Select this *checkbox* as an invoice number is required each time a subrecipient submits a financial report.

i. **Require Receiver ID on financial reports**: Selecting or deselecting this checkbox will determine if program income will be tracked and reported in this program's financial reports.

j. **Track program income with Finance Reports**: Leave the default selection here.

k. **Submission Notes**: An eCivis customer service representative will help with configuring the application/ submission process for this solicitation, so this textbox may be used to provide instructions to eCivis. Follow the guidance provided on this screen by entering detailed information on the submission deadline, like the date and time of day including the time zone.

l. Once this step is completed click the *Save > button* Save ❯ to proceed.

14) **Goals**: In this tab, enter the goals being tracked in this program. These goals will be included in the application and must be reported on by all subrecipients in the post-award grantor process. Please note this section is optional to complete and *cannot be edited* once the solicitation is published.

a. **Add Solicitation Goal**: Click the *Add New Goal > button* Add New Goal ❯ to get started. Enter the following items for each goal:
   - **Goal Title***
   - **Target Units*** - in numbers, only
   - Click Save Goal ❯ to continue. Additional fields will appear including the option to Add Subgoal ❯ for further specification.

   - Repeat these steps as needed to add multiple goals to your program.

   NOTE: This section is optional; goals entered here will be utilized by subrecipients to enter and report goal metrics in the application and post-award process.

b. Once this step is completed, click Save ❯ to proceed.

15) Approval: Utilize this tab to define approval workflows for each task in the program lifecycle. The following **Task Types** and their descriptions are provided below and can also be found by clicking the *Information button* ⓘ located to the right of the task name:

   a. **Recommendation Approval**: This approval workflow is triggered when an award recommendation is created. It occurs before the applicant is notified of their award offer. To define the approval workflow, click the *Pencil Icon* 🖉 and a pop-up window will appear prompting the Agency eCivis user to select the following:

- **Approval Type**: *Standard* or *Sequential*
- **Designated for Approval**: *User* or *User Group*

   b. **Final Award Approval**: This approval workflow is triggered when an award is accepted by an applicant and is the final approval before an application enters awarded status. To define the approval workflow, click the *Pencil Icon* 🖉 and a pop-up window will appear so the Agency eCivis user may select from the following:

- **Approval Type:** *Standard* or *Sequential*
- **Designated for Approval:** *User* or *User Group*

c. **Activity Report Approval**: This approval workflow is triggered when an activity report is submitted by a subrecipient. Click the *Pencil Icon* 🖉 and select:

- **Approval Type**: *Standard* or *Sequential*
- **Designated for Approval**: *User* or *User Group*
- **Organization Tag**: Use the left/right arrows to add/remove organization tags.
- **Instructions**: Enter instructions for the subrecipient to utilize when submitting an activity report.
- **Define an optional frequency for the Activity Report Task Info**: Specify the frequency of reporting. See the blue information icon for more guidance.

d. **Financial Report Approval**: This approval workflow is triggered when a financial report is submitted by a subrecipient. To define the approval workflow, click the *Pencil Icon* 🖉 and the Agency eCivis user will select from the following:

- **Approval Type:*** *Standard* or *Sequential*
- **Designated for Approval:*** *User* or *User Group*
- **Organization Tag**: Use the left/right arrows to add/remove organization tags.
- **Instructions**: In the textbox enter instructions for the subrecipient to utilize when submitting an activity report.
- **Display acknowledgement statement.*** Select *Yes* to include the following:
  By submitting this report, I certify to the best of my knowledge and belief that the report is true, complete, and accurate, and the expenditures, disbursements and cash receipts are for the purposes and objectives set forth in the terms and conditions of the subaward. I am aware that any false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil or administrative penalties for fraud, false statements, false claims or otherwise. 2 CFR 200.415a (U.S. Code Title 18, Section 1001 and Title 31, Sections 3729-3730 and 3801-3812).
- **Define an optional frequency for the Activity Report Task Info**: Specify the frequency of reporting using the fields provided.

e. **Amendment Approval**: This approval workflow is triggered when a subrecipient requests a grant amendment. If selected, this workflow can also be used for financial amendments without changes to the award amount. To define the approval workflow, click the *Pencil Icon* 🖉 and select the following:

- **Approval Type**: *Standard* or *Sequential*
- **Use this workflow for grant financial amendments that do not change the award amount?**: This checkbox will utilize the current workflow for non-financial amendments.
- **Designated for Approval**: *User* or *User Group*

f. **Amendment Approval with Finance**: This approval workflow is triggered when a subrecipient requests a grant amendment with changes to the award amount.

To define the approval workflow, click the *Pencil Icon* 🖉 and select the following:

- **Approval Type**: *Standard* or *Sequential*
- **Designated for Approval**: *User* or *User Group*

g. **Grantor Amendment Approval**: This approval workflow is triggered when an agency eCivis user initiates the amendment for the subrecipient. To define the approval workflow, click the *Pencil Icon* 🖉 and select the following:

- **Approval Type**: *Standard* or *Sequential*
- **Designated for Approval**: *User* or *User Group*

Define a workflow for the Grantor Amendment Approval Task

Approval Type:*

○ Standard ⓘ   ○ Sequential ⓘ

Designated for Approval:*

○ User

Choose a user that will be designated as approver

| Department 1 | ˅ |

| Agency eCivis User | ˅ |

○ User Group

Choose a user group that will be designated for approval. The group is based off Approval Type selected above.

| Select User Group | ˅ |

h. **Grantor Amendment Approval with Finance**: This approval workflow is initiated by an Agency eCivis user for the subrecipient with changes to the award amount.

To define the approval workflow, click the *Pencil Icon* and select the following:

- **Approval Type**: *Standard* or *Sequential*
- **Designated for Approval**: *User* or *User Group*

Define a workflow for the Grantor Amendment Approval With Finance Task

Approval Type:*

○ Standard ⓘ   ○ Sequential ⓘ

Designated for Approval:*

○ User

Choose a user that will be designated as approver

| Department 1 | ˅ |

| Agency eCivis User | ˅ |

○ User Group

Choose a user group that will be designated for approval. The group is based off Approval Type selected above.

| Select User Group | ˅ |

i. **Grantor Amendment Final Approval**: This final approval is initiated by an Agency eCivis user for the subrecipient with changes to the award amount. To define the approval workflow, click the *Pencil Icon* and select the following:

- **Approval Type**: *Standard* or *Sequential*
- **Designated for Approval**: *User* or *User Group*

Define a workflow for the Grantor Amendment Final Approval Task

Approval Type:*
  ◉ Standard 🔵   ○ Sequential 🔵

Designated for Approval:*
  ◉ User
     Choose a user that will be designated as approver

     [Department 1   ⌄]

     [Agency eCivis User   ⌄]

  ○ User Group
     Choose a user group that will be designated for approval. The group is based off Approval Type selected above.

     [Select User Group   ⌄]

j. **Closeout Approval**: This approval workflow is triggered when the closeout process is initiated by a subrecipient. To define the approval workflow, click the *Pencil Icon* 🖊 and a pop-up window will appear, prompting the Agency eCivis user to select the following:

- **Approval Type**: *Standard* or *Sequential*
- **Designated for Approval**: *User* or *User Group*
- **Organization Tag**: Use the left/right arrows to add/remove organization tags from the task.
- **Display Acknowledgement Statement**: Select *Yes* to include an SBA-required statement that will appear to subrecipients when a closeout report is submitted. This will require the subrecipient to acknowledge the statement before submitting their report. Copy and paste the following text:
  - ☐ By submitting this report, I certify to the best of my knowledge and belief that the report is true, complete, and accurate, and the expenditures, disbursements and cash receipts are for the purposes and objectives set forth in the terms and conditions of the subaward. I am aware that any false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil or administrative penalties for fraud, false statements, false claims or otherwise. 2 CFR 200.415a (U.S. Code Title 18, Section 1001 and Title 31, Sections 3729-3730 and 3801-3812).
- **Acknowledge Statement**: If *Yes* is selected, a text box will appear to enter the acknowledge statement.

Define a workflow for the Closeout Approval Task

Approval Type: *

○ Standard ⓘ   ○ Sequential ⓘ

Designated for Approval: *

● User
Choose a user that will be designated as approver

[Department 10 ▾]

[Sarah Sanchez ▾]

○ User Group
Choose a user group that will be designated for approval. The group is based off Approval Type selected above.

[Select User Group ▾]

Organization Tag:

All Organization Tags   Selected Organization Tags

Activity
Financial
Maintenance of Effort - FORM UPL(
Match - Non-CashIn-Kind3rdParty -
Monitoring
MOU Executed - No
MOU Executed - Yes - UPLOAD MOl
New Grant Tag Test

Display acknowledgement statement: * ⓘ

○ Yes ● No

If any of these tasks require multiple approvers, return to *Step 2: Create/ Manage Approval Groups for the Solicitation* of this user guide for additional guidance.

k. Award Files -> *Add File button* [Add File ❯]
l. Once the approval workflows are defined for ALL the **Task Types,** this step is completed; click the *Save > button* [Save ❯] to proceed.

29

Select Approval Workflow

Define a workflow for the Grant Amendment Approval Task

Approval Type:*

◉ Standard ❓ ◯ Sequential ❓

Use this workflow for grant financial amendments that do not change the award amount? ☐

Designated for Approval:*

◉ User
Choose a user that will be designated as approver

[Select Department ⌄]

[Select User ⌄]

◯ User Group
Choose a user group that will be designated for approval. The group is based off Approval Type selected above.

[Select User Group ⌄]

Save ❯   Close ❯

Step 4: Publishing the Solicitation and Creating the Application Workspace

1) Once the Indiana State agency thoroughly reviews each section of the solicitation, the Application Workspace is ready to be configured. The Agency eCivis user must return to the **Solicitation Edit** page and ensure ALL the section header tabs are marked with a green checkmark. Then click the *Done button* Done and return to the **Program Dashboard** page.

2) Prior to proceeding, click on the *Actions* button to the right of the program name's Title and select **Create App Workspace**.

3) An additional pop-up window will appear. Click the **Yes** button a to publish your solicitation.

30

4) The application configuration process will begin. A system-generated email stating the solicitation is **Under Review** is sent to the Primary Workspace email address. In addition, the status of your program's solicitation will then be updated to **Under Review** until created by the eCivis Support Team.

Department 1	Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF)	N/A	Under Review	$18,000.00	Actions

5) An invitation to access the Zengine Application Workspace will be sent to the Primary Workspace email provided in the solicitation once it is ready, within 24 to 48 hours.

From: zengine+36520@srm.ecivis.com
Sent: Wednesday, March 15, 2023 2:12 PM
To:
Subject: [EXTERNAL] You have been invited to join the workspace "State of Indiana Title IV (V2)" on Zengine

zengine+36520@srm.ecivis.com has invited you to join the workspace **State of Indiana Title IV (V2)** on Zengine.

Hey Zengine user, ready to expand your horizons?

By accepting this invitation you will be brought directly to the Zengine home screen after signing in to the application, and can then access this new workspace.

Accept Invitation to Join Zengine Workspace

If the link above does not open, you can also copy and paste the following address into your browser: https://platform.zenginehq.com?inviteCode=e43beb217f67d41a4c2f768358eb9689&workspace.id=36520&email=

Learn more about Zengine or contact us with any questions at 1-877-767-9493 or support@wizehive.com and we can assist you. Thank you.

The Zengine Team

Conclusion

Once the Zengine Application Workspace invitation is accepted, the Agency eCivis user should view the *SOI User Guide - Grantor 2. Application and Review Form Creation* for instructions on creating the program's application and viewing the budget.