



State of Indiana eCivis Grants Network Grantor User Guide

Application and Review Form Creation

November 2023

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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.

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.

Default Application Fields – Provided grant application fields for Indiana State Agency grant programs. These fields can be edited or hidden. Additionally, grant application fields can be added (if needed) by the Agency eCivis user under the Default Application.

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 Grants Network – The grant management system created by eCivis for State Grantees/Grantors.

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.

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.

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

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>.

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 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.

Scorecard – A scorecard is a form a reviewer will use to numerically score an application. A scorecard will consist of multiple fields to evaluate an application and an accompanying numerical value to measure the strength of that field.

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).

Statewide Application – The grant application fields established by the State Budget Agency (SBA) that are included as part of all Indiana State Agency grant programs. These fields are to remain intact for all grant programs and should not be edited and/or deleted. Only one field is required, Project Narrative, which Indiana State Agencies will need to direct their Applicants on the specific use of e.g., Executive Summary, Project Narrative, etc.

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.

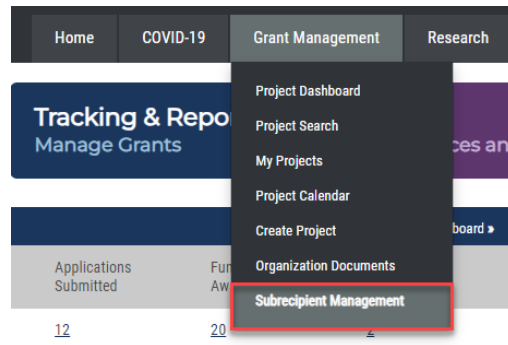
Purpose

The purpose of this user guide is to provide instructions to State Agencies on how to create and edit an application for a program solicitation. Agency eCivis users should have completed *SOI User Guide - Grantor 1. Creating a Solicitation*, first. NOTE: The solicitation budget is created during solicitation creation and cannot be edited in this section.

Step 1: Add or Remove Workspace Members

This step is necessary if additional team members will configure applications and review forms, or who will be responsible for moving applications into the “Awarded” status.

- 1) On the eCivis Grants Network homepage, the Program Lead will select *Subrecipient Management* from the dropdown menu in the **Grant Management** tab.



- 2) In the *Subrecipient Management* page, navigate to the **Program Solicitations** table at the bottom of the screen. In this table, click on the appropriate title of the program solicitation that requires additional workspace members.

Program Solicitations ⓘ Hide Archived Programs

Department	Title	Program Type	Status	Total Funding	Actions
Department 1	Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRE)	N/A	Draft	\$20,000,000.00	Actions

- 3) In the appropriate program page, click on *Application Workspace*. This will open the Zengine Application Workspace.

Program Detail

Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRE) Under Review

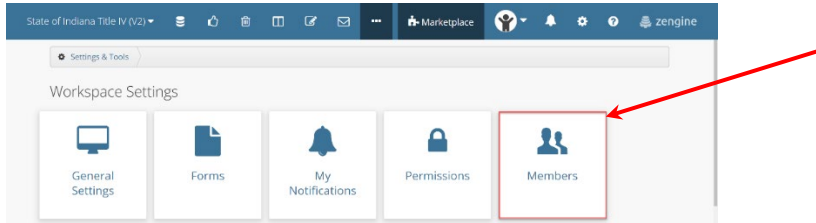
Department: Department 1
Total Funding: \$18,000.00
Application Period: 12/27/2022 - 03/01/2023

[Subrecipient Reporting](#) [Edit Solicitation](#) [Preview Application](#) [Application Workspace](#) [Revert to Draft](#)

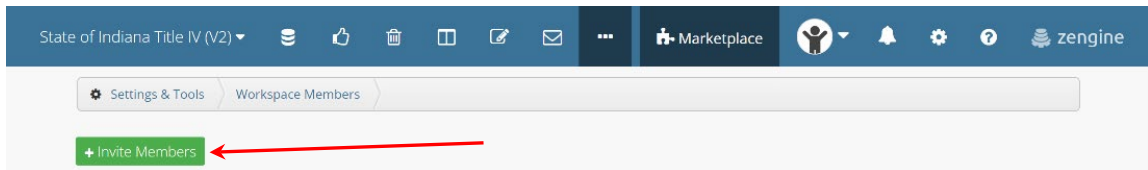
4) Click the *Settings & Tools gear icon*  at the top of the page.



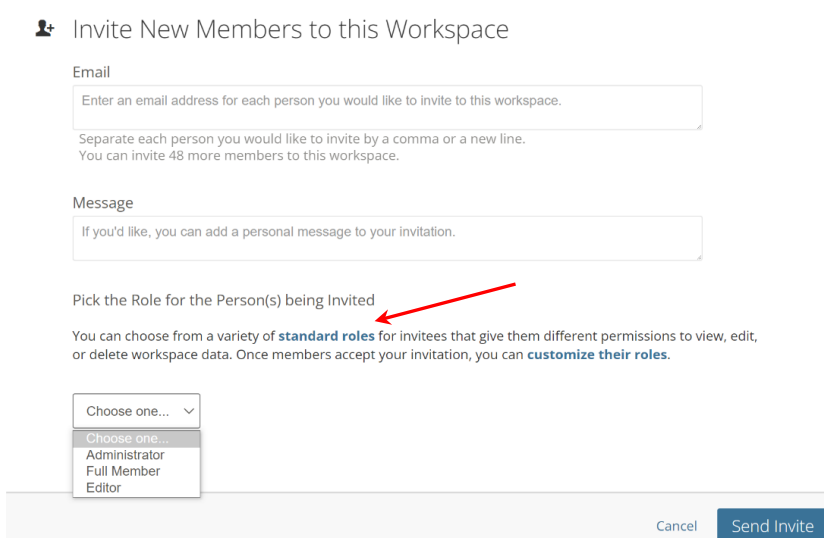
5) Click *Members*.



6) Click the *+ Invite Members button*  to add additional members.



7) The Agency eCivis user will then be prompted to enter the email address and user role of the additional member. Refer to the “Standard Roles” link for an explanation of the user levels. Once a Role has been selected, additional “Members in this role” information will appear.

A screenshot of the 'Invite New Members to this Workspace' form. The form has a light gray background and contains several sections: 'Email' with a text input field and instructions, 'Message' with a text input field, and 'Pick the Role for the Person(s) being Invited' with a dropdown menu. A red arrow points to the dropdown menu. At the bottom right, there are 'Cancel' and 'Send Invite' buttons.

Invite New Members to this Workspace


Email
Enter an email address for each person you would like to invite to this workspace.
Separate each person you would like to invite by a comma or a new line.
You can invite 48 more members to this workspace.

Message
If you'd like, you can add a personal message to your invitation.

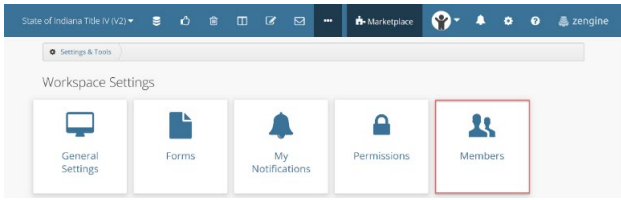
Pick the Role for the Person(s) being Invited
You can choose from a variety of **standard roles** for invitees that give them different permissions to view, edit, or delete workspace data. Once members accept your invitation, you can **customize their roles**.

Choose one...
Choose one...
Administrator
Full Member
Editor

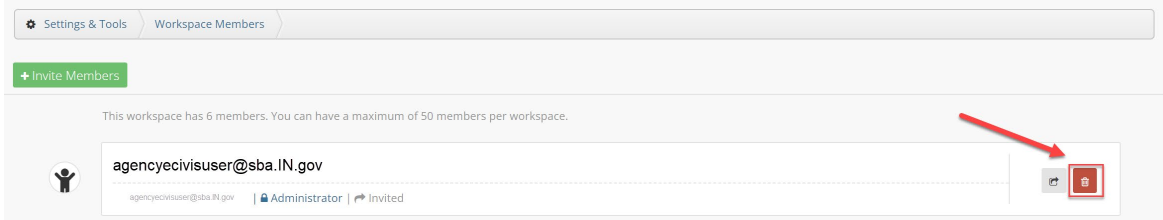
Cancel Send Invite

8) Add the appropriate email address and user role and click the *Send Invite button* . A maximum of 50 workspace members can be on a project.

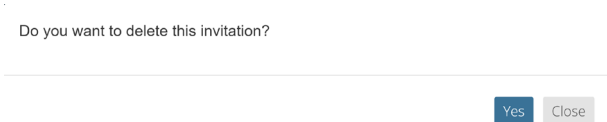
9) To remove a workspace member, return to the **Members** screen in the **Settings** page.



10) Click the *Delete Invite icon*  to remove the team member.



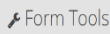
11) A warning screen will appear. Click the *Yes button*  to finalize.

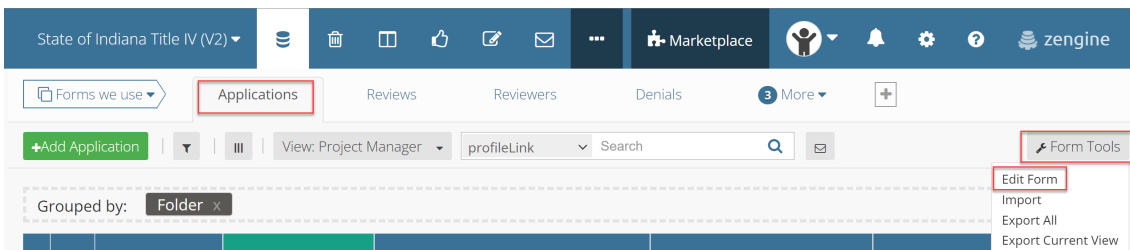



Step 2: Edit Application Content

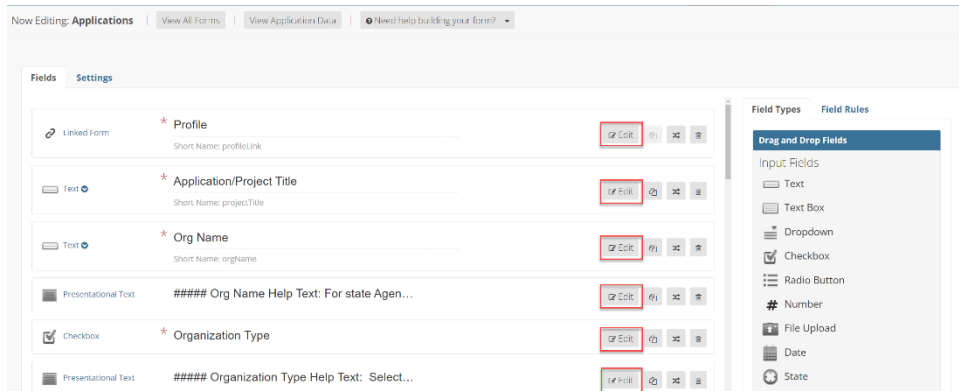
eCivis will populate the Application Workspace with the State of Indiana application template. The Statewide application fields should not be edited while the Default Application fields should be tailored to best fit the program's needs.

Before publishing the solicitation, custom help text and optional or mandatory file uploads can be added. The Applicant can view help text below the field.

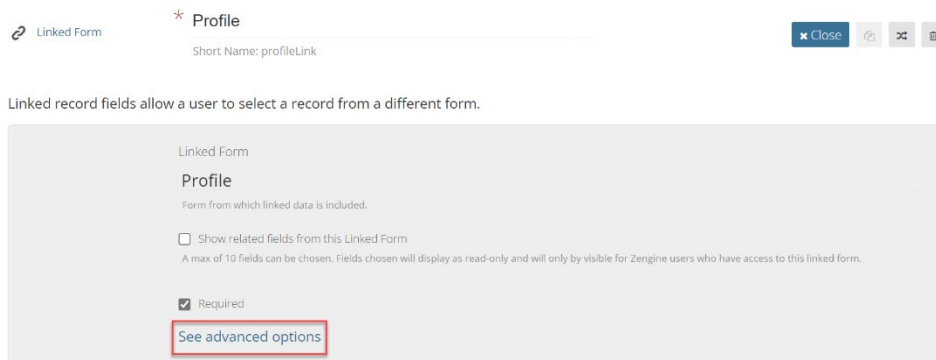
- 1) To reuse an existing Default Application Field, update the field name.
 - a. Note: Editing application field reduces the risk of remembering which fields to show on your application and which ones to hide.
- 2) To add help text, field restrictions, file uploads, and other fields, click *Applications*. On the right side of the page, click the *Form Tools button*  and then *Edit Form*.



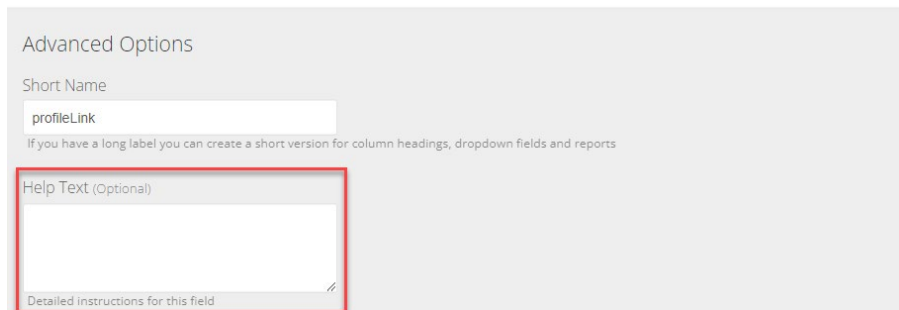
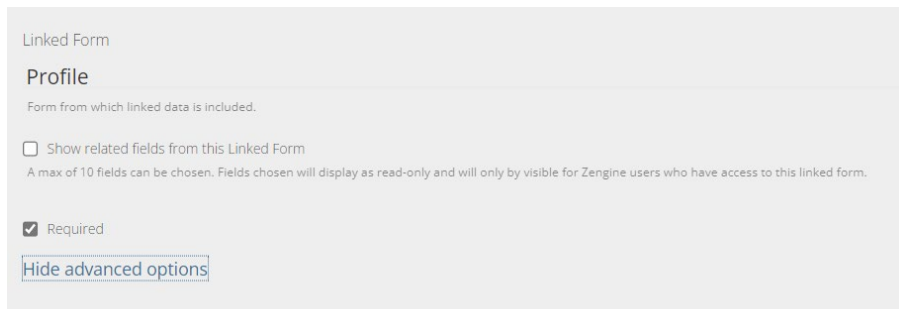
3) Click the *Edit button*  for the desired field. Agency eCivis users cannot edit or remove **Linked Forms**.



4) Scroll to the bottom of the selected Fields windows to click *See advanced options*.



5) In this screen, help text can be entered in the **Help Text** box. Help text can be used to provide additional text assistance to clarify fields in an application and will be viewable to the applicant after the question in a smaller font.



In the Fields windows following Profile, under **Validation Options**, “Text” boxes allow the Agency eCivis user to set the “Maximum Length.” Additionally, other forms of validation such as numeric, zip code, phone number, and email address formatting can be included. For “Text Box” fields, the Agency eCivis user can set “Maximum Length,” “Minimum Amount of Words,” and “Maximum Amount of Words.”

The screenshot shows a window titled "Validation Options" with three sections, each containing a text input field and a descriptive label below it:

- Maximum Length:** A text input field with the label "Maximum amount of characters user is allowed to input when filling in this field" below it.
- Minimum Amount of Words:** A text input field with the label "Minimum amount of words user is allowed to input when filling in this field" below it.
- Maximum Amount of Words:** A text input field with the label "Maximum amount of words user is allowed to input when filling in this field" below it.

If new fields are needed, they can be added through the “Drag and Drop” fields. The following fields can be added to an application:

Field Types **Field Rules**

Drag and Drop Fields

Input Fields

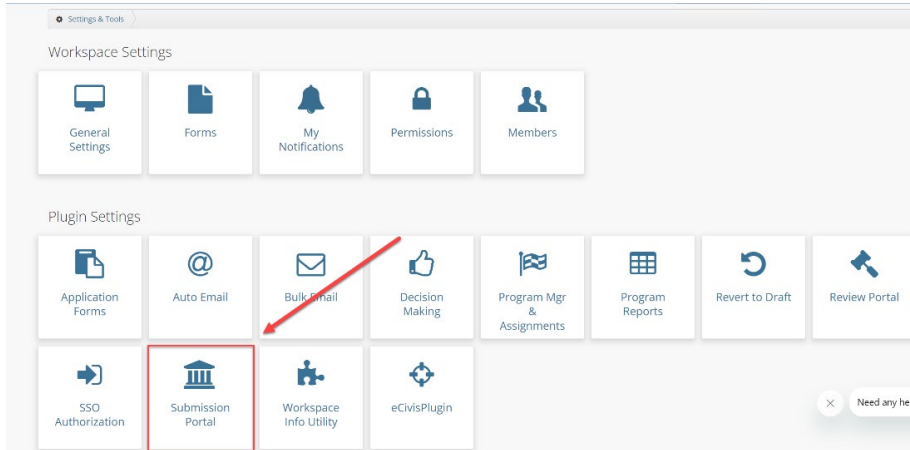
- a. Text
- b. Text Box
- c. Dropdown
- d. Checkbox
- e. Radio Button
- f. Number
- g. File Upload


- a. **Text** - allows for the input of a short amount of text.
- b. **Text Box** - allows for the input of a longer amount of text.
- c. **Dropdown** - allows for an Applicant to select from a pre-determined list of options presented as a dropdown.
- d. **Checkbox** - Allows for an Applicant to select from a pre-determined list of options presented as a checkbox.
- e. **Radio Button** - Allows for an Applicant to select from a pre-determined list of options presented as radio buttons.
- f. **Number** - Allows for the input of a number with decimal places.
- g. **File Upload** - Allows for an Applicant to upload documents or media. To make this field required, click the required box. Also allows for the input of a short amount of text.

6) Once all added fields are completed, it is important to ensure that all fields are displayed in Zengine. To check whether fields are not hidden, the Agency eCivis user will click the *Settings & Tools icon* .



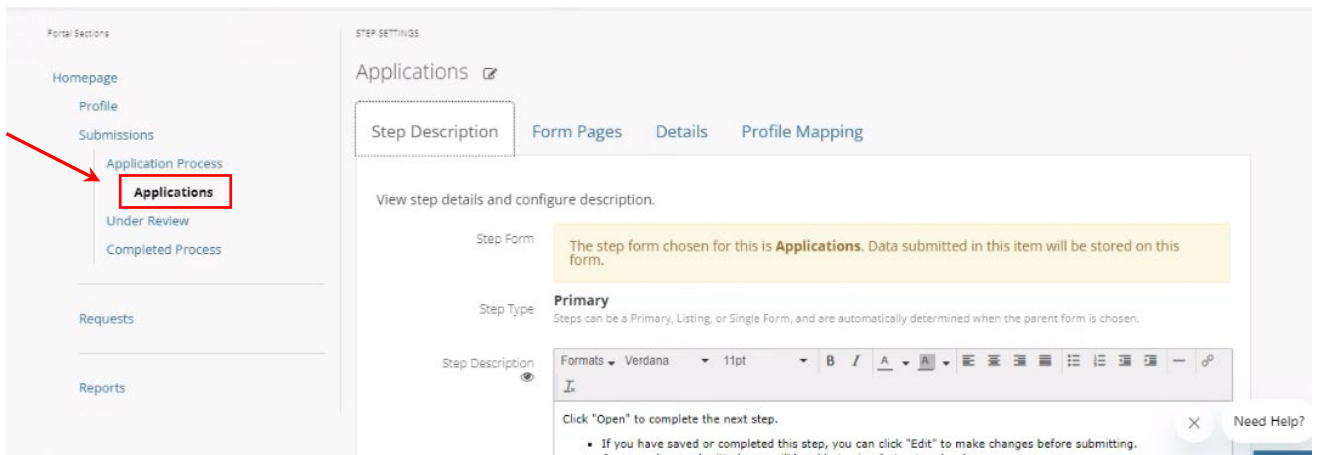
7) In the **Settings & Tools** page, navigate to the **Submission Portal**.



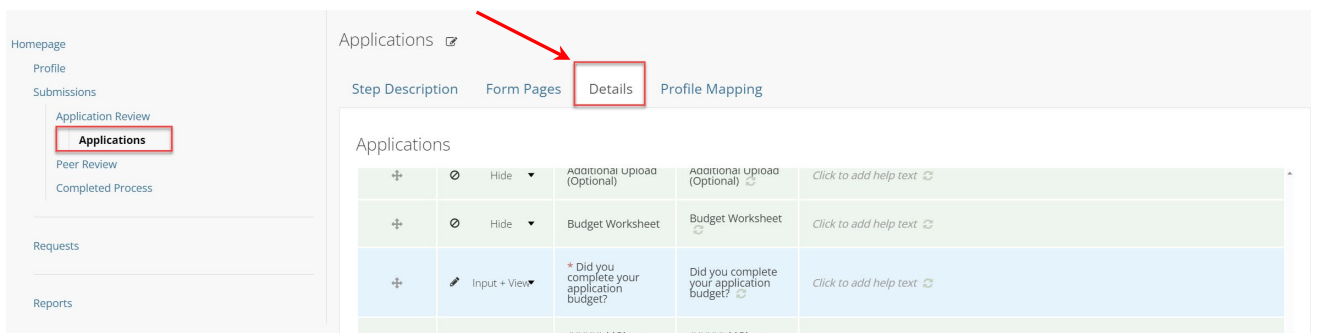
8) At the right of the screen, click the **Edit Submission Portal** icon .



9) In the **Edit Submission Portal** screen, click on **Applications** on the tab selection to the left of the screen.

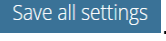


10) Within the **Applications** review screen, click on the **Details** tab.



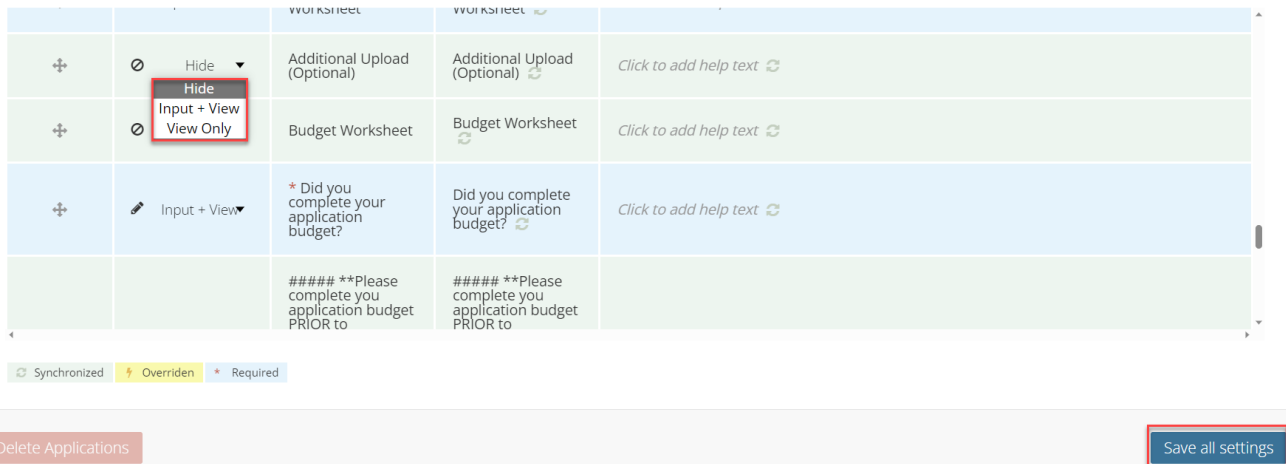
11) In this screen, each application entry will have a corresponding row.

The second column allows Agency eCivis users to set the view setting for this field. For fields Applicants need to fill out, change this setting to “Input + View”.

When finished, click the *Save all settings button* .

NOTE: For application content, do not delete fields, rather *Hide* those that shouldn't be shown.

Applications




		worksheet	worksheet	
+	Hide Hide Input + View View Only	Additional Upload (Optional)	Additional Upload (Optional)	Click to add help text
+		Budget Worksheet	Budget Worksheet	Click to add help text
+	Input + View	* Did you complete your application budget?	Did you complete your application budget?	Click to add help text
		##### **Please complete you application budget PRIOR to	##### **Please complete you application budget PRIOR to	

Synchronized Overridden Required

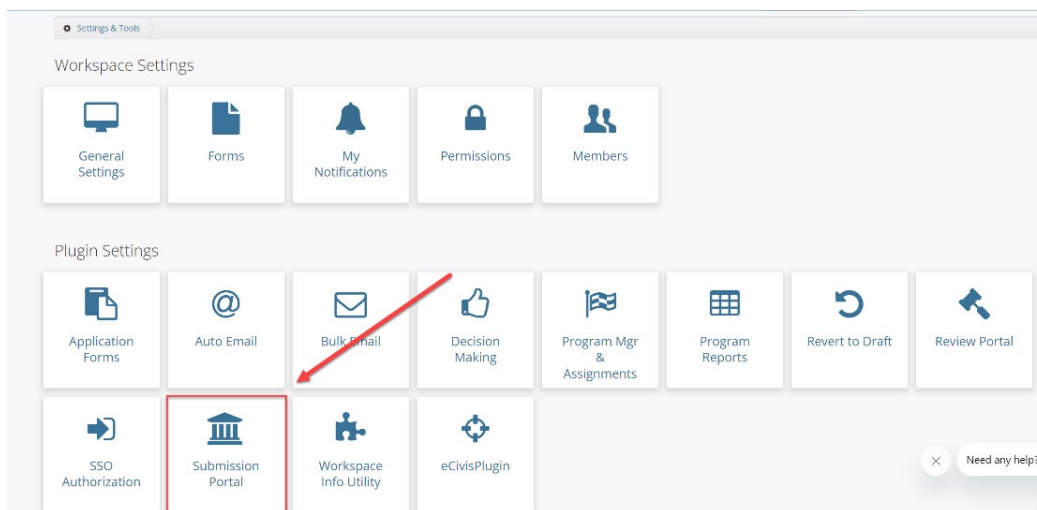
Delete Applications Save all settings

Adjusting Application Deadlines

12) The default application due time is 11:59 PM (EST) on the selected due date. This is configured in the application **Submission Portal**. To access this feature, the Agency eCivis user will click the *Settings & Tools icon* . SBA recommends that agencies set the application due no later than 4:00 PM on a workday.



13) In the **Settings & Tools** page, navigate to the **Submission Portal**.



Settings & Tools

Workspace Settings

- General Settings
- Forms
- My Notifications
- Permissions
- Members

Plugin Settings

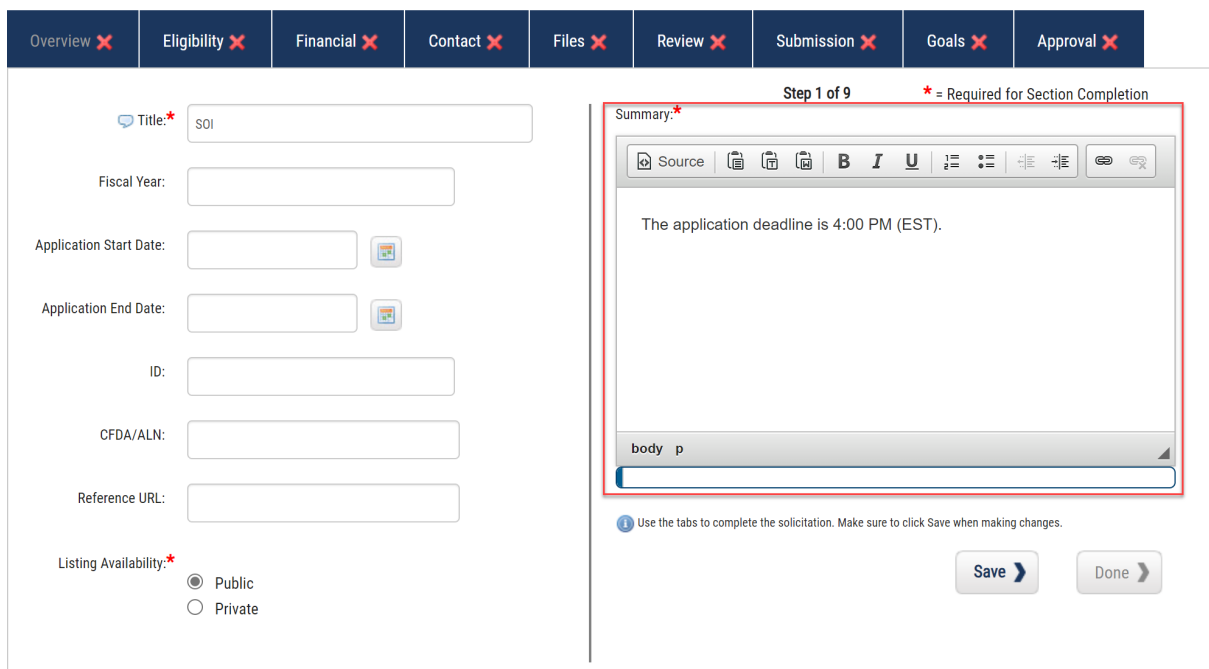
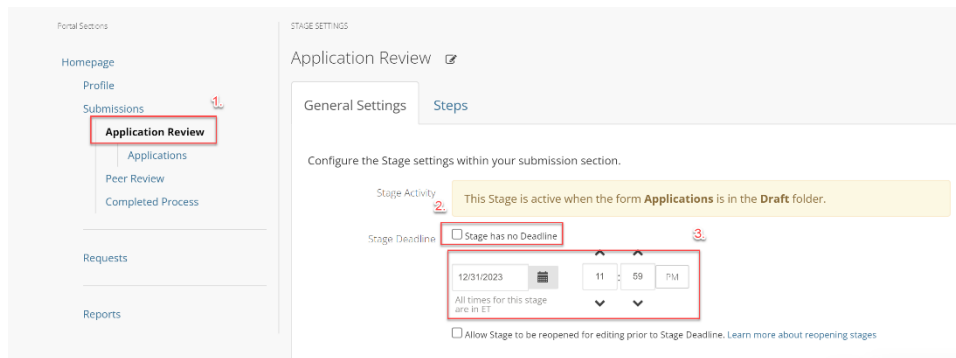
- Application Forms
- Auto Email
- Bulk Email
- Decision Making
- Program Mgr & Assignments
- Program Reports
- Revert to Draft
- Review Portal
- SSO Authorization
- Submission Portal
- Workspace Info Utility
- eCivisPlugin

Need any help?

14) At the right of the screen, click the *Edit Submission button* .





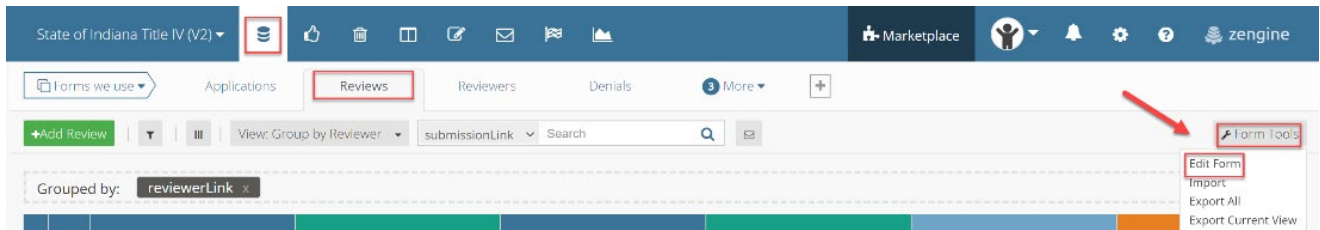
15) In the **Edit Submission Portal** screen, click on *Application Review* on the tab selection to the left. Within the **Application Review** screen, uncheck the **Stage Deadline** checkbox. From there, edit the time from “11:59 PM” to the preferred time on the preferred deadline date. The State of Indiana preferred time is to end the application period no later than 4:00 PM on a workday. The time zone for all deadlines will be in EST. The deadline is not displayed in the solicitation or application. Therefore, at a minimum, Agency eCivis users must provide the time in the program solicitation under the **Overview** tab. Please see [SOI User Guide - Grantor 1. Creating a Solicitation](#) for more information about editing a solicitation.




Step 3: Edit Review Content

Fields following the State required fields in the scorecard can be edited or weighted differently to best serve a program's application. Additional fields and adjustments can also be made to the application.

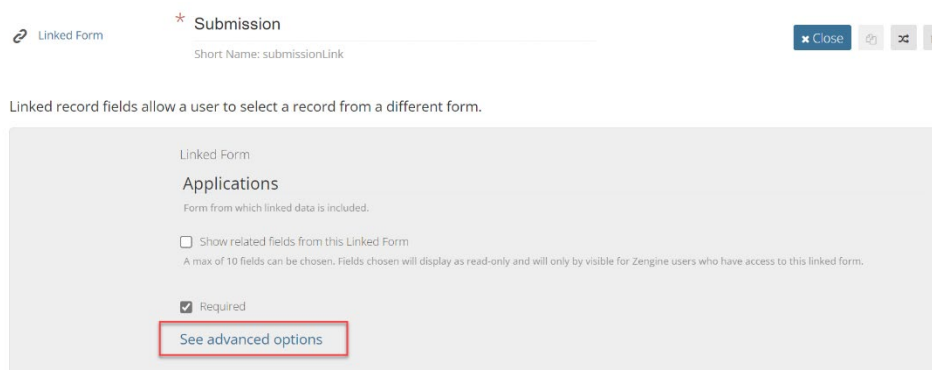
- 1) To access the review form, click *Reviews* from the *Data icon*  at the top of the page. On the right side of the page, click the *Form Tools* button  and then click on *Edit Form*.



- 2) This will display the fields for the review form. Clicking the *Edit button*  will allow the Agency eCivis user to edit the specific field.



- 3) Click *See advanced options*. This will allow the Agency eCivis user to enter help text to assist in guiding reviewers and editing the impact of each field's score (i.e., "weight") by adjusting minimum and maximum values under the Validation Options.



- 4) To add additional file uploads, refer to [Step 2: Edit Application Content](#) as the process is performed in the same way.

NOTE: If a field needs to be removed, it should be hidden and never deleted.

5) Click the *Save Form button*  after all desired edits are completed.

Below is an example of a Review Scorecard with no additional fields. Each field is weighted equally, with a numerical score determining the strength of that field. A higher score indicates a stronger response from an Applicant. The following table displays the meaning behind the scores.

Review Scorecard

Title	Definition	Score
Clearly Defined	The field is adequately addressing all required information.	8 - 10
Somewhat Defined	The field is addressing some of the required information.	5 - 7
Not Clearly Defined	The field is narrowly addressing the required information.	1 - 4
Not Defined	The field does not address any of the required information.	0


Examples of fields to use within Review Scorecard:

Application Fields	Scoring Range
Project Narrative	0-10
State Budget Category	0-10
State Legislative Districts	0-10
Congressional Legislative Districts	0-10
Project Narrative #1	0-10
Project Narrative #2	0-10
Application Fields	Scoring Range
Project Narrative #3	0-10
Project Timeline	0-10
Organization Demographics	0-10
Target Populations Served Demographics	0-10
Project Goals and Objectives	0-10
Collaborative Elements and Partners	0-10
Sustainability Plan	0-10
Evaluation Plan	0-10
Monitoring Plan	0-10
Program-Specific Criteria #1	0-10
Program-Specific Criteria #2	0-10
Program-Specific Criteria #3	0-10
Program-Specific Criteria #4	0-10
Program-Specific Criteria #5	0-10

Step 4: Testing the Application

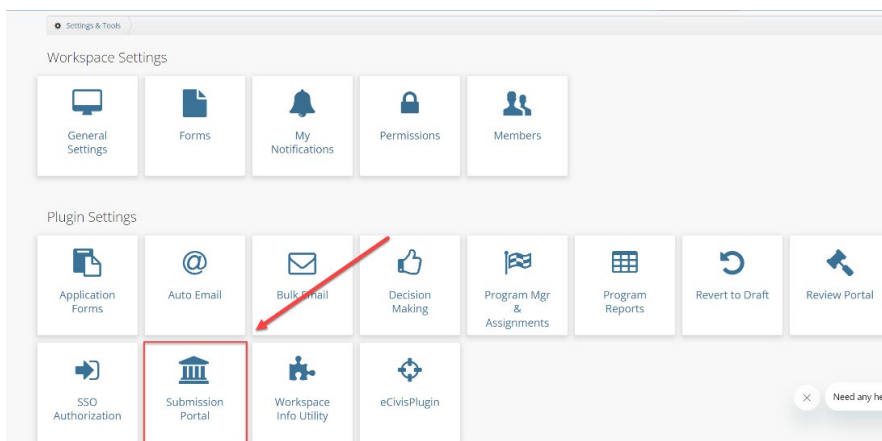
Before the program solicitation is made public, the created application can be tested by Agency eCivis users using the method explained below.

Viewing the Application from the Applicant's Point View

- 1) To view the application from the Applicant's point of view, the **Test Submission Portal** feature will be used. To access this feature, the Agency eCivis user will click the **Settings & Tools icon** .

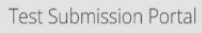


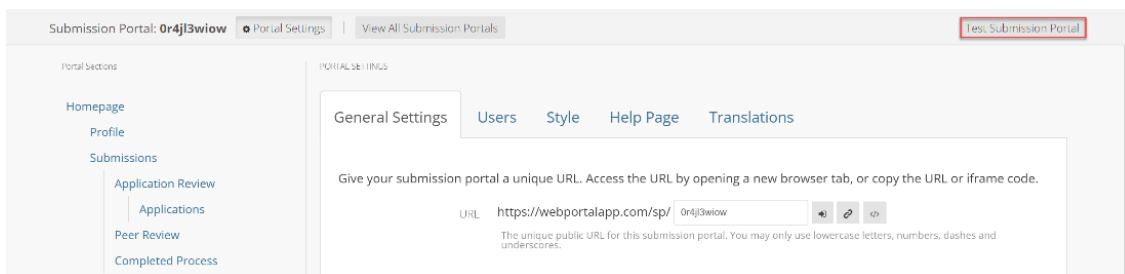
- 2) In the **Settings & Tools** page, navigate to the **Submission Portal**.



- 3) At the right of the screen, click the **Edit Submission button** .



- 4) In the **Edit Submission Portal** screen, click on the **Test Submission Portal button**  at the top right. This will allow an Agency eCivis user to view the application as if they were applying for the grant.



Step 5: Publishing the Application and Solicitation

- 1) To publish the solicitation and accompanying application, the Agency eCivis user will need to reply to the original “Under Review” email sent from eCivis Support.

Thank you for completing the details of your solicitation and moving it to “Under Review” status. Here is a brief summary of your submitted information:

Title: DO NOT DELETE - SOI Program Application - Training

Description:

TBD

Department: Department 1

Status: **UNDER REVIEW**

Your eCivis dedicated Customer Success Manager will be contacting you within 1-2 business days in an effort to complete and publish your solicitation.

Publishing your solicitation will include the creation of a Zengine workspace. Think of this workspace as the one place you go for this solicitation’s applicants, reviewers, review assignments, scoring, and making award decisions. Each solicitation you publish will have its own designated Zengine workspace.

Once your solicitation is published, the primary workspace owner will receive an invitation email to join the workspace so you can begin accepting applications on your anticipated application start date.

Some information to have ready for your call with your eCivis Customer Success Representative is:

- What standard forms are necessary for your applicants to fill out to apply for this solicitation?
 - Examples include SF-424 Application, SF-424D/B Assurances Construction or Non-Construction, Attachments, SF-424C/A Budgets Construction or Non-Construction, etc.
- Are there any non-standard or custom forms required for this application?
- What are the first and last names and email addresses of your applicant review committee members?

If you need to make changes to your program while it is under review, please contact your client service representative. This will ensure your eCivis account is up-to-date with your Zengine workspace to prevent delays in the application and review process.

Should you need to modify any information about your solicitation (before or after publishing), please contact your dedicated eCivis Customer Success Manager as soon as possible by replying to this email, contact our Customer Success team at (877) 232-4847 option 2 between 8:00 a.m. and 5:00 p.m. PT, or email support@ecivis.com. Your eCivis rep will be happy to make the necessary changes on your behalf.

Sincerely,

The eCivis Support Team

support@ecivis.com

- 2) The Agency eCivis user will reply to this email with, “Please publish by (DATE).”
The application will then be live on the requested date.

Conclusion

Once the solicitation and application are published, and the specified Application Start Date has passed, Applicants can begin submitting applications to the program. The *SOI User Guide - Grantor 3. Review and Evaluation* details the processing for assigning evaluators and application reviews.