State of Indiana eCivis Grants Network Grantor User Guide

Application Review Management
September 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.

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.

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.

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.

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.

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.

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.

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

Reviewer – See Evaluator.

Reviewer Portal – The eCivis Portal Evaluators will log in to access their assessments and application reviews.

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).

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 the eCivis reviewer functionality. Agency eCivis users managing a program solicitation with applications will utilize these features.

Step 1: Reviewer Portal After Publishing Grant Program

After emailing support@ecivis.com to publish a grant program, an email will be sent notifying the Agency eCivis user of when the grant program is available. This email will also include a link to access the reviewer portal. Once reviewers and their corresponding applications are assigned, the provided Reviewer Portal link can be distributed to begin the evaluation process.

Step 2: Adding or Removing Reviewers

1) On the eCivis Grants Network homepage, the Agency eCivis user 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 reviewer modification.

3) In the appropriate program page, click *Edit Solicitation.*
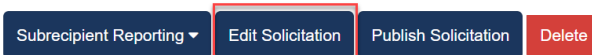
4) Click on the *Review* tab. This is the page where the Agency eCivis user can add or remove reviewers.

    a. In this tab the Agency eCivis user can add reviewers by clicking the *Add Reviewer >* *button* Add Reviewer ❯ . This will prompt a form to appear. In this form, the Agency eCivis user will be asked to enter the reviewer's *First Name*, *Last Name*, and *Email*. Once the reviewer's information is entered, click the *Add Reviewer >button* Add Reviewer ❯ .
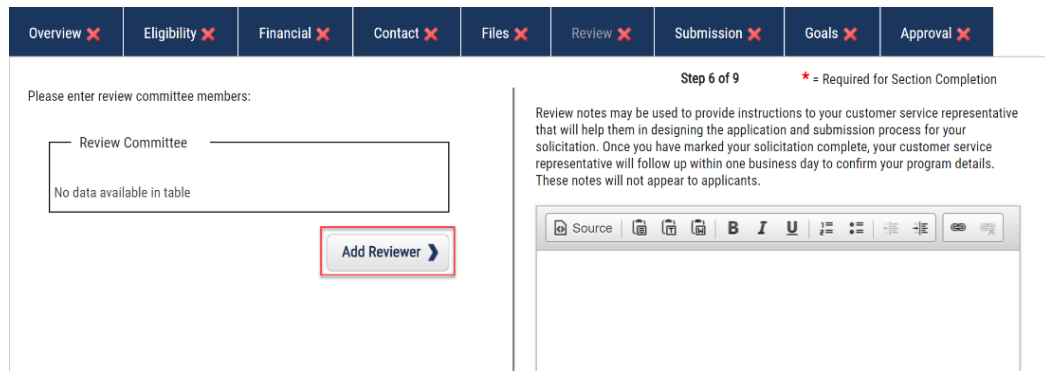
    b. To remove reviewers, navigate to the **Review Committee** box. Next to each reviewer is the *Delete icon* 🗑; clicking on it will remove the reviewer on the corresponding row.

    c. To populate the **Reviewers** section in the Zengine Workspace, the Agency eCivis user who set up the solicitation should input their information to be the first reviewer.

5) After modifying reviewers, click the *Save > button* Save ❯ at the bottom of the **Review** tab.

6) The modifications performed here will be automatically imported into the Zengine Workspace.

Step 3: Assigning Applications to Reviewers

The Zengine Application Workspace will need to be accessed to manage application assignments to reviewers.

1) Enter the corresponding Zengine Application Workspace for the appropriate program. Click on *Application Workspace* to enter the Zengine Workspace.
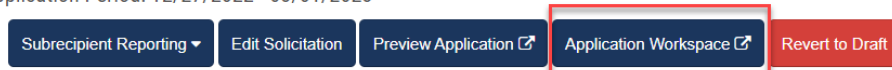

2) In the new screen, notice the banner icons at the top of the screen. Click the *Program Mgr & Assignments icon* , which denotes the *Program Manager* feature.

3) On the following page, click the *Edit Assignments button* .
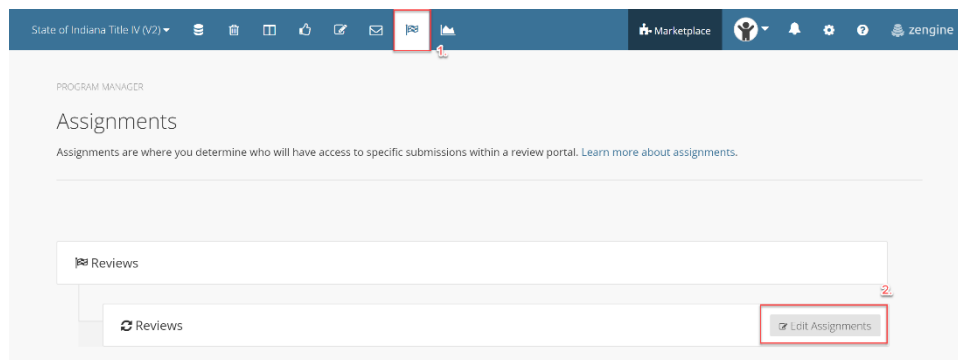
4) The Agency eCivis user can make assignments by *Submission, Submission Group, Member, or Batch Assign*.
   a. *Assign by Submission*
      - This is a manual assignment based on an application submission. The Program Manager (Agency eCivis user that first created the solicitation and Zengine Workspace) selects a *Submission* and then clicks *Assign* to add a single reviewer to the assignment list.
   b. *Assignments by Submission Group*
      - This is a manual assignment based on a previously created submission group. This submission group can include multiple reviewer team members and can have a specified reviewer workflow. The Program Manager can then select a submission group and then click *Assign* to add members within that group to the assignment.
   c. *Assign by Member*

- This is a manual assignment based on the review team member. The Program Manager selects a *Member* and then clicks *Assign* to add a single Submission to the assignment list.
  d. *Batch Assign*
  - This is a random assignment based on criteria specified in the batch assignment process. The Program Manager must specify whether these random assignments will be made based on the submission, member, or submission group. Then input the number of entries that will be assigned and choose to limit these assignments to specific reviewers. Once this information is provided click *Assign*.
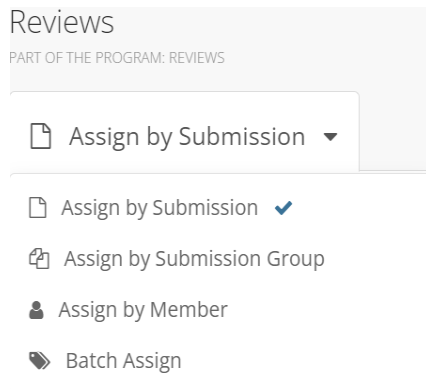
Step 4: Reopening a Review

This step will be managed in the Zengine Application Workspace.

1) To reopen an application assessment, which covers a review of the application responses and reviewer scoresheet, click on the *Review* tab (via the *Data icon* 🗄).
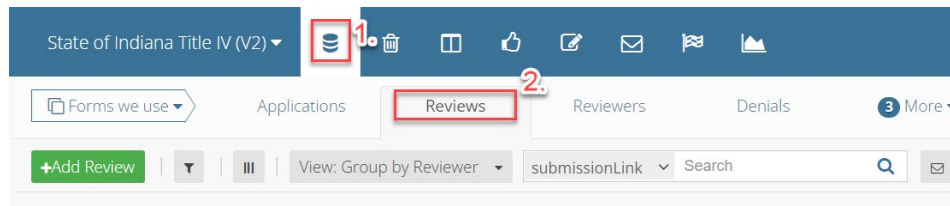
2) In this screen, all reviews regardless of status (not started, in progress, or submitted) are shown. Select the review that needs to be reopened or changed.


3) In the selected review screen, there is an option to return the review to draft status. Clicking on the folder and selecting "In Progress" or "Not Started" will revert the review to draft status.
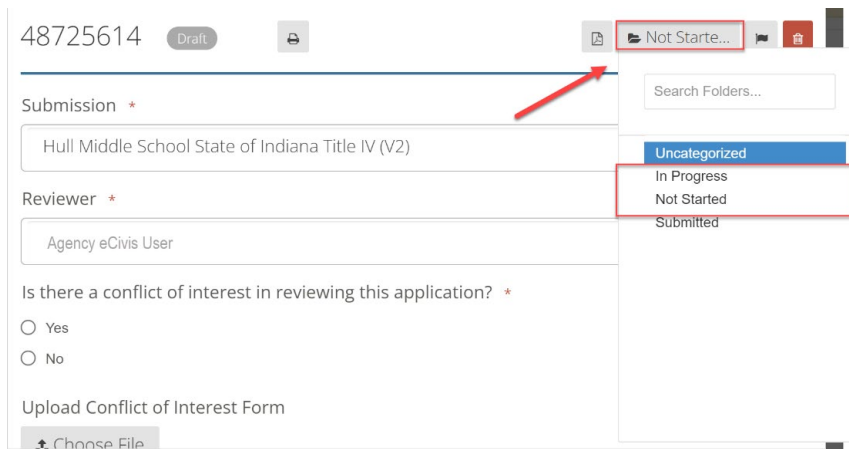
Step 5: Review Feedback & Scores

There are two forms where Agency eCivis users can check other reviewers' application feedback and scores.

1) In the *Forms* tab, click on the *Reviews* header at the top of the screen. This form contains the feedback and category scoring submitted by the reviewer for each application they were assigned.
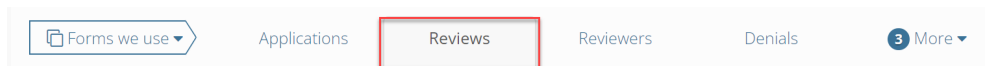
2) The default view groups reviews by status (not started, in progress, or submitted). However, this can be regrouped by application and by reviewer. To change the Agency eCivis user's view, click on the *View* dropdown menu and select the desired view.
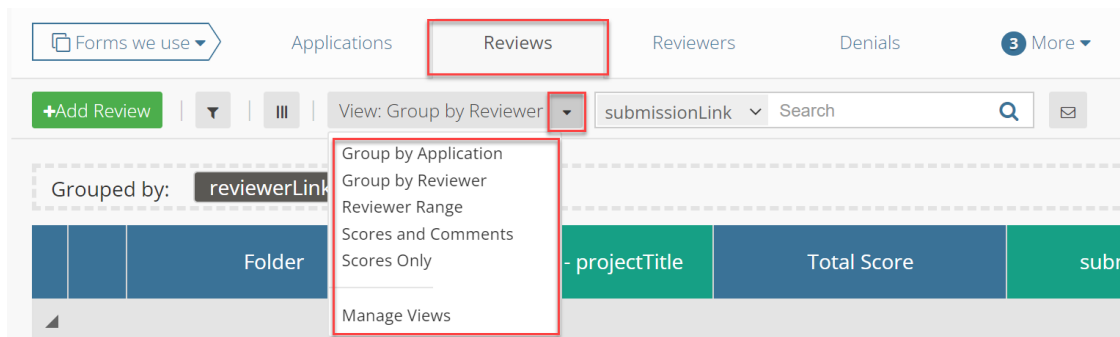
3) In the Reviews tab, the Applicant's total score will be shown in the *Total Score* column. The bar at the bottom can be used to scroll left and right to display more information. Each view in Zengine Workspace can also be edited by clicking the *vertical lines icon* �III .

4) Views in Zengine Workspace can be saved by clicking *save as new view.*

5) Upon clicking *save as new view*, a new screen will appear to confirm. Click the *Save button* Save .
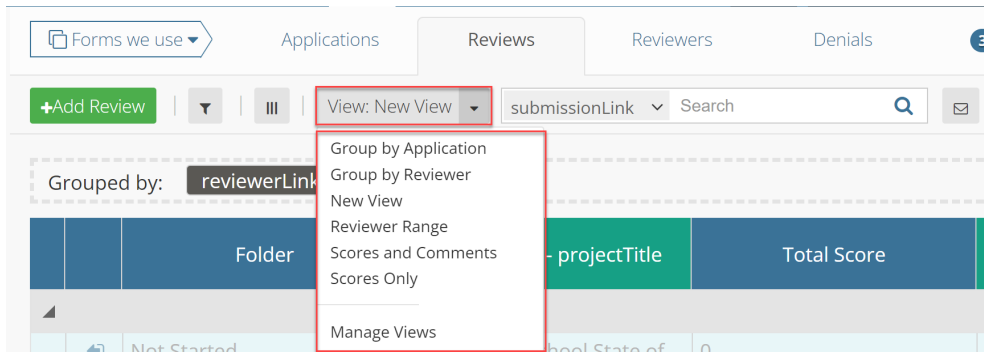
Choose a name for your view.

New View

Please keep it under 50 characters

You can add 54 more views to this workspace.

Cancel   Save

6) Saved views can be accessed by clicking the *View* box.

7) The second form to review is the *Applications* tab. Here each applicant's average score is included at the bottom of each record. As a reminder, the bar at the bottom can be used to scroll left and right to display more information.

Step 6: Bulk Emails

In Zengine, the Bulk Email functionality is optional and can be used to specify a list of recipients to send an email directly from the system. The Budget Agency does not recommend using this feature to email and inform applicants of their final award decisions, as necessary documentation an agency should provide an individual applicant regarding the decision would not be included.

For instances aside from award decisions that a bulk email could be useful:

1) The Agency eCivis user will navigate to the homepage and hover over **Grant Management** and click on *Subrecipient Management*.
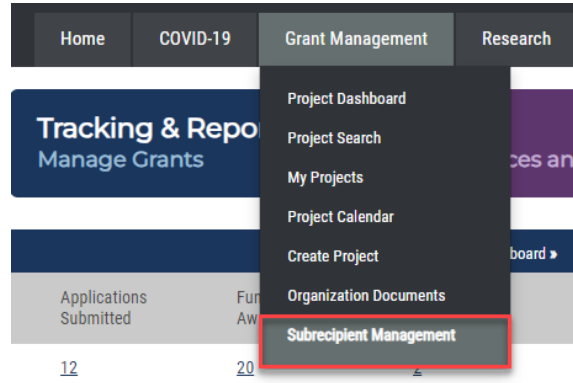
1) In the *Subrecipient Management* page, navigate to the **Program Solicitations** table at the bottom of the screen. In the Actions column for the program select *View Detail.*

2) On the Program Detail page click the Application Workspace button .

3) The Agency eCivis user will navigate to the program's Application Workspace. On the banner click the *Bulk Email button* ✉ to navigate to the **Bulk Email** feature.
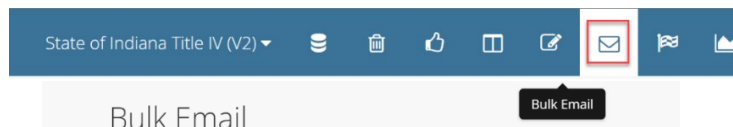
4) The **Bulk Email** page will appear; click the *New Email button* New Email .
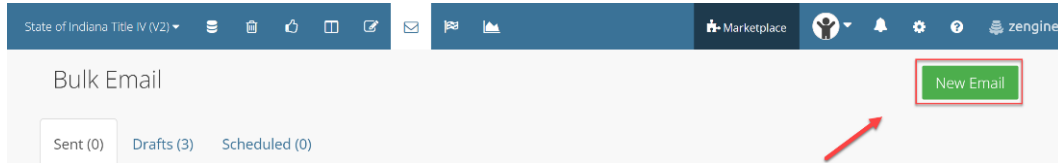
5) A draft email form will appear. Begin creating the email by locating and specifying the recipient(s). Click and edit the following fields to create a draft email:
   a. *Recipients Form:* Click the dropdown menu and select the form that contains the recipient's email information.
   b. *Email Field:* Click the dropdown menu and select the field that contains the correct email address.
   c. *Filter Recipients*: Click this button to filter the recipient list based on specific criteria.

   d. Example: If this bulk email is intended only for denied applications, use the dropdown menus to set the criteria as follows:
   • *Field* – Folder
   • *Condition* – Is
   • *Value* – Denied

6) The next section of the email specifies who the email is from and its contents.
   a. *From Name:* Enter the name of the individual/organization that will appear in the recipient's email.
   b. *Reply To:* Enter the email address of the individual/organization who will be receiving responses.

c. *Send To:* This is an automated field that shows the number of recipients that match the previously selected filter criteria.
d. *Subject:* Enter the subject line for the email; additionally, an *Insert Field* option will be given to pull in data from a previous form.
e. *Body:* Draft the email message and subject line; utilize the *Insert Field* option to pull in data from a previous form.


7) Once the bulk email is drafted utilize the following options to proceed:
   a. **Preview** `Preview` : Click this button to look at a preview of the email before sending.
   b. **Schedule Email** `⊘ Schedule Email` : Click this button to schedule a specific date and time for the email to be sent.
   c. **Send Now** `Send Now` : Click this button to send an email immediately.

8) Once the bulk email is sent it will appear in the **Sent** tab of this section.
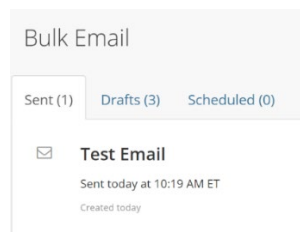
Step 7: Reviewing Awards and Denials

1) Agency eCivis users can review their program solicitation awards and denials in two locations.

2) The Zengine Workspace of the program solicitation will list all received applications. Click *Filter* on the **Status** column to filter by awards and denials. A new filter screen will appear. Select "Folder" in the **Field** dropdown and select either "Denied" or "Awarded" in the Value dropdown. Combine both filters with an "and" logic and this will list all applications that have been awarded or denied.

3) Awarded applications are also displayed in the program solicitation's **Program Detail** page. Under the **Subrecipient Awards** table, all subrecipients in the program solicitation are listed. This is also the table in which Agency eCivis users can interact with individual subrecipients.

Subrecipient Awards

Project	Organization	Award Manager	Award/ Contract Number	Award Type	Status	Contract Start	Contract End	Total Award
Bemidji School Elementary District - Title IV	Bemidji School Elementary District		DOE-FY23-00001	N/A	Awarded	04/16/2023	12/31/2023	$95,000.00

Conclusion

After awards or denials have been issued, the Agency eCivis user can manage those subrecipients awards through the *SOI User Guide - Grantor 4. Managing Subrecipients.*