



State of Indiana eCivis Grants Network Grantor User Guide

Managing Subrecipients

June 2024

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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.

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).

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.

Award Approval Package – The collection of documents, within a task, which support the finalization of a grant award captured in eCivis Grants Network. This includes an auto-generated award notice from eCivis Grants Network, awarded budget, and goal setting (if enabled as part of the solicitation setup)—along with any specific documents uploaded and provided to the Subrecipient by the Grantor (agreement, further post-award guidance, reporting template, etc.).

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.

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.

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.

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.

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.”

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.

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>.

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.

Recipient – As part of the Grantor award recommendation process performed by an Agency eCivis user in eCivis Grants Network, the Recipient is the Applicant (person or organization) receiving the award directly from the Indiana State Agency. While the Federal definition of ‘Recipient’ does not include Subrecipients—as its definition is strictly being the direct recipient of the Federal funding from the Federal Grantor (i.e., not being a Subrecipient from an entity that received the Federal funding)—within eCivis Grants Network, the Recipient and Subrecipient have been used synonymously. Also, referred to as the Prime Recipient.

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

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.

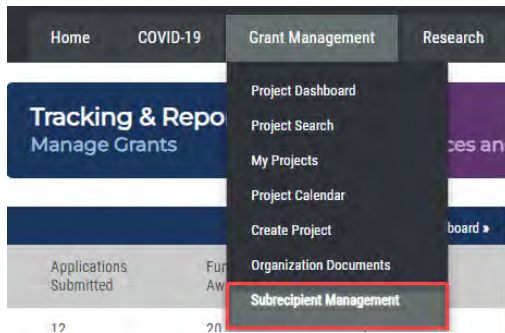
Zengine – The third-party tool used for the configuration of online applications, application review forms, assignment of reviewers to applications, and online review and scoring of submitted grant applications. This is also referred to as the Application Workspace.

Section 1 – Purpose

The purpose of this user guide is to provide specific instructions to grantors (Indiana State Agencies) finalizing award decisions by creating application awards or denials. Additional topics include sending bulk emails and viewing and managing these awards in the eCivis Grants Network subrecipient management portal.

Section 2 – Creating an Application Denial


- 1) Once the review/scoring process is completed, and the Agency eCivis user has determined which program applications they intend to deny, the Agency eCivis user will navigate to the program's Application Workspace, accessed via the eCivis Grants Network homepage, **Grant Management** tab, and clicking on *Subrecipient Management*.



- 2) On the **Subrecipient Management** page, navigate to the **Program Solicitations** table at the bottom of the screen. Click the **Title** of the program that will be denied.

Program Solicitations ⓘ Hide Archived Programs

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

- 3) On the appropriate program's page, click the *Application Workspace* button .

Program Detail


State of Indiana Title IV (V2) Published

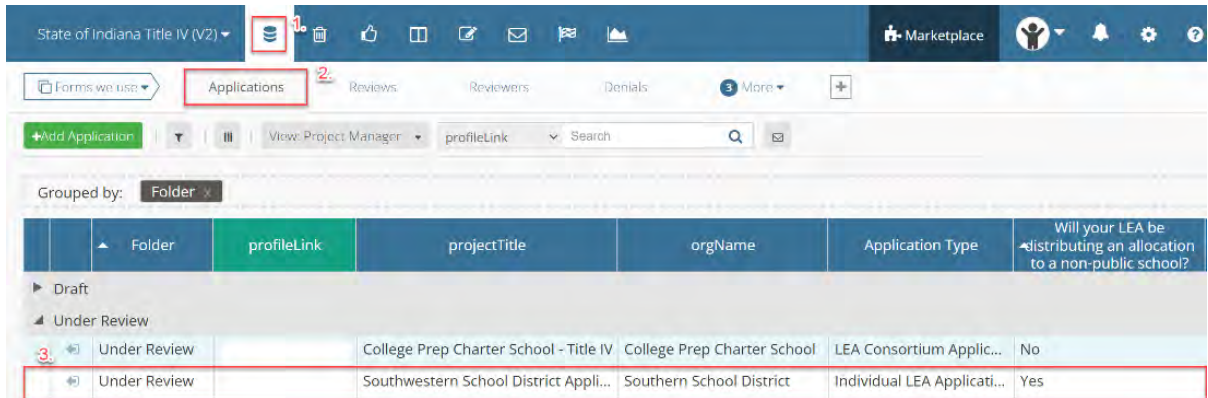
Department: Agency A

Total Funding: \$700,000.00

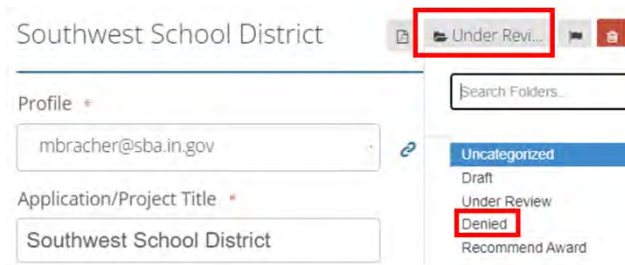
Application Period: 03/01/2023 - 08/31/2023





- 4) The Zengine Workspace will open. Follow the steps as labeled in the screenshot below.
 1. At the top of the screen, click the *Data icon* .
 2. From the **Applications** tab, the Agency eCivis user will...
 3. Select the application to be denied.

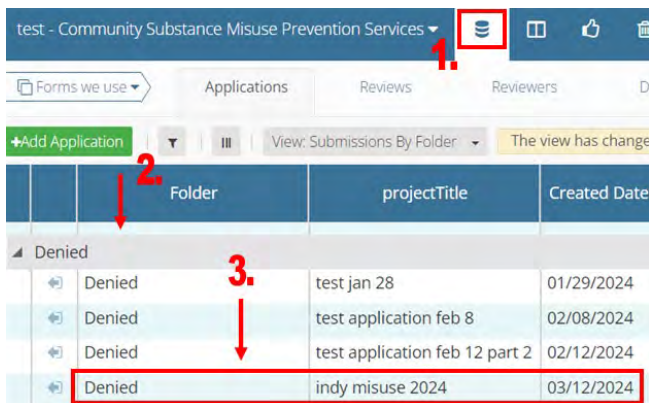


- 5) The Agency eCivis user will select the *Folder Icon* for the application and a dropdown menu will appear. Update the status from *Under Review* to *Denied* by clicking “*Denied*”.

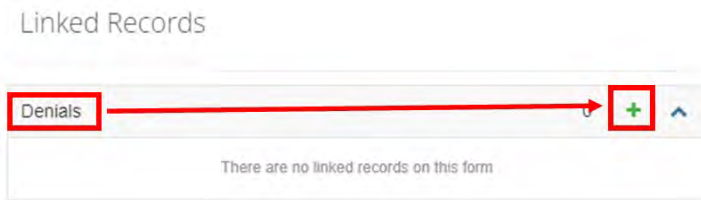


- 6) At the bottom left of the Application window, the Agency eCivis user will click on the *Save [Applicant Name] button*  to update the application record.
- 7) Once the application record is updated, it will appear as **Denied** in the Agency user’s **Application Workspace** in the denial folder, and in the Applicant’s **eCivis Grants Portal**. **NOTE:** This step does *not* notify the applicant of the denial.

- 8) To notify an applicant of a Denied application, follow the steps as show in the screenshot.
 1. At the top of the screen, click the *Data icon* .
 2. The Agency eCivis User will scroll down to the *Denied* folder.
 3. Click on the *Denied* application you wish to notify.



- 9) Once the **Denied Application** form appears, the Agency eCivis user will select the *Green Plus icon* **+** in the Denial table on the far right to “Add New Denial”.

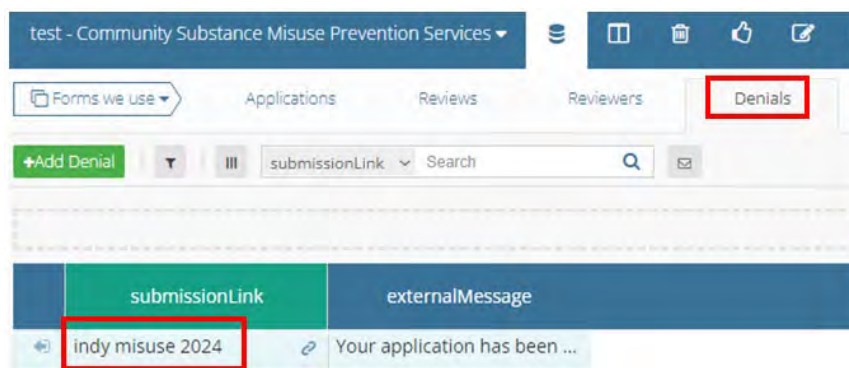


- 10) The Submission Title will auto-populate in the Submission field. The Agency eCivis User will enter the reason for denial in the *External Message* that will appear in the **eCivis Grants Portal** and click the *Save and Return+* button.

NOTE: SBA encourages agencies to work with their Communications staff regarding all messages to potential grantees.

The image shows the 'New Denial' form. The 'Award Denial' section has a 'Submission' dropdown menu with 'indy misuse 2024' selected. Below this is a text area for 'External Message' with a red box around it. At the bottom, there is a 'Save and Return +' button also highlighted with a red box.

The application will now appear in the **Denials** tab in the Agency eCivis user's **Application Workspace**.

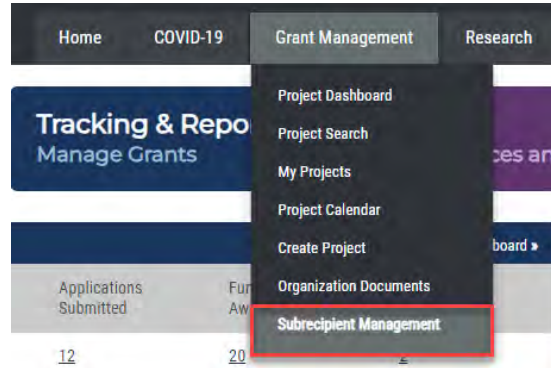


NOTE: An additional option for contacting applicants is available within Zengine, via the Bulk Email function. For applicants that proceed to [Section 3 – Creating an Application Award](#) & [Section 4 – Creating and Approving an Award Recommendation](#), Grantor communication moves to eCivis within Subrecipient Management.

For more information, see **Step 6: Bulk Emails** of [Grantor User Guide 3 - Application Review Management](#).

Section 3 – Viewing an Award

- 1) On the eCivis Grants Network homepage, the Agency eCivis user will click *Subrecipient Management* from the **Grant Management** tab.



- 2) From the **Program Dashboard** page, the Agency eCivis user will select the appropriate program title.

Program Solicitations 1 Hide Archived Programs

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

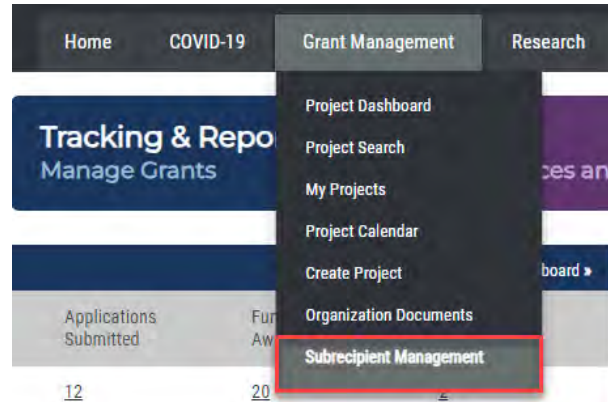
- 3) On the **Program Detail** page, the Agency eCivis user will scroll down to the **Subrecipient Awards** section and click a Project name to view the **Subrecipient Detail** page.

Subrecipient Awards

Project	Organization	Award Manager	Award/Contract Number	Award Type	Status	Contract Start	Contract End	Total Award
<u>Bemidji School Elementary District - Title IV</u>	Bemidji School Elementary District		DOE-FY23-00001	N/A	Awarded	04/16/2023	12/31/2023	\$95,000.00
<u>Northeastern School District Application</u>	Northeastern School District Application		DOE-FY23-00006	N/A	Awarded	05/01/2023	11/30/2023	\$130,000.00

Section 4 – Creating an Application Award

- 1) Once the review/scoring process is completed and the Agency eCivis user has determined the awards for the program, the Agency eCivis user will navigate to the program Application Workspace, accessed via the eCivis Grants Network homepage, **Grant Management** tab, and clicking on *Subrecipient Management*.



- 2) On the **Subrecipient Management** page, navigate to the **Program Solicitations** table at the bottom of the screen. Click the **Title** of the program that will be used to create the award.

Program Solicitations Hide Archived Programs

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

- 3) On the appropriate program's page, click the *Application Workspace button* [Application Workspace](#).

Program Detail

State of Indiana Title IV (V2) Published

Department: Agency A

Total Funding: \$700,000.00

Application Period: 03/01/2023 - 08/31/2023

[Subrecipient Reporting](#)
[Subrecipient Monitoring](#)
[Add Task](#)
[Edit Solicitation](#)
[Preview Application](#)
[Ext. Solicitation Listing](#)
[Application Workspace](#)

- 4) This brings the Agency eCivis user to the Zengine Workspace. At the top of the screen, click the *Data icon* . On the **Applications** tab, the Agency eCivis user will select the application to be awarded.


State of Indiana Title IV (V2)

Forms we use: [Applications](#) [Reviews](#) [Reviewers](#) [Denials](#) [More](#)

View: Project Manager profileLink Search

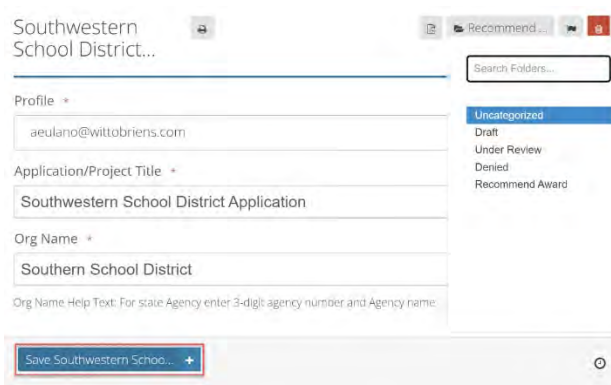
Grouped by: Folder

Folder	profileLink	projectTitle	orgName	Application Type	Will your LEA be distributing an allocation to a non-public school?
Draft					
Under Review					
3		College Prep Charter School - Title IV	College Prep Charter School	LEA Consortium Applic...	No
4		Southwestern School District Appli...	Southern School District	Individual LEA Applicati...	Yes

- 5) The Agency eCivis user will select the *Folder Icon*  for the application and a dropdown menu will appear. The Agency eCivis user will change the status to *Recommend Award*.



- 6) At the bottom left of the Application window, the Agency eCivis user will click on the *Save [Applicant Name] button*  to update the application record.



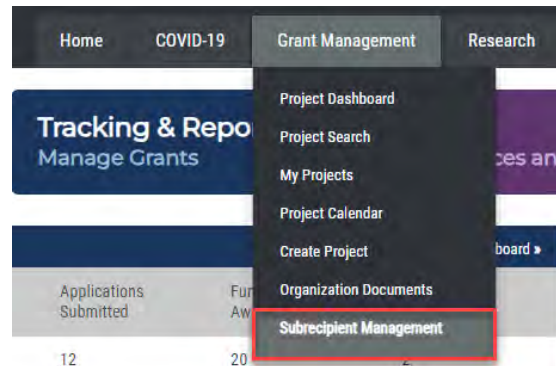
- 7) Once the application record is updated, it will appear as **Recommend Award** in the Agency eCivis user's **Application Workspace**, and **Under Review** in the Applicant's **eCivis Grants Portal**.

Folder	profileLink	projectTitle	orgName	Application Type	Will your LEA be distributing an allocation to a non-public school?
▶ Draft					
▶ Under Review					
▶ Denied					
▶ Recommend Award					
Recommend ...		Northern School District - Title IV	Northern School District	Other	
Recommend ...		Hull Middle School State of Indian...	Hull Middle School	Individual LEA Applicati...	No
Recommend ...		Northeastern School District Appli...	Northeastern School Distri...	Individual LEA Applicati...	No
Recommend ...		Bemidji School Elementary District...	Bemidji School Elementary ...	Individual LEA Applicati...	Yes
Recommend ...		Central Unified School District - Tid...	Central Unified School Dist...	Individual LEA Applicati...	Yes
Recommend ...		Southwestern School District Appli...	Southern School District	Individual LEA Applicati...	Yes

NOTE: This step does *not* award the applicant. It enables the Agency eCivis user to create an award recommendation in the eCivis Grants Network Program Detail page.

Section 5 – Creating and Approving an Award Recommendation

- 1) On the eCivis Grants Network homepage, the Agency eCivis user will select *Subrecipient Management* from the **Grant Management** tab.



- 2) On the **Program Dashboard** page, the Agency eCivis user will click the appropriate **Title** from the **Program Solicitations** table.

Program Solicitations Hide Archived Programs

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

- 3) This opens the **Program Detail** page, and the awarded application will appear in the **Pending Awards** section. The Agency eCivis user will click *Actions* and then *Create Recommendation* in the right-most column of the relevant Project name row.

Pending Awards Include Rejected Awards

Project	Org Name	Award Manager	Award/ Contract Number	Recommendation Status	Current Approver	Actions
Southwestern School District Application	Southern School District		DOE-FY23-00007	Recommendation Pending	N/A	Actions Create Recommendation

- 4) The **Award Recommendation Approval Task Creation** form will appear. Complete the form and ensure all required information indicated by an asterisk is provided:
 - a. **Recipient**: auto-populated based on the recipient's name pulled from the application.
 - b. **Project**: auto-populated based on the eCivis project name pulled from the application.
 - c. **Subrecipient**: Select the appropriate option from the dropdown menu.
 - d. **Subrecipient Risk**: If a risk assessment was conducted on the subrecipient select High, Medium, or Low from the dropdown list.
 - e. **Award Manager**: From the dropdown list select the Award Manager.
 - f. **External Note** *: visible to the subrecipient and cannot exceed 1,000 characters.
 - g. **Internal Note** *: visible internally to the approver and cannot exceed 1,000 characters.

Award Recommendation Approval Task Creation

a. Recipient: Southern School District

b. Project: Southwestern School District Application

c. Subrecipient:

d. Subrecipient Risk:

e. Award Manager:

f. External Note:*
external

1000 characters remaining.

g. Internal Note:*
internal

1000 characters remaining.

- h. **EIN:** Enter the Employee Identification Number (EIN) following the standard format
- Example: 12-1234567
- i. **Award/Contract Number:** Enter the Award/Contract Number using the following SBA requirements:
- If the award/contract is based on a Purchase Order (PO), enter the *Purchase Order (PO) number*. If the program is based on a Purchase Order then enter the PO # in the Award/Contract Number field and PO Number Field.
 - If the award/contract is not Purchase Order (PO)-based, enter the *Allocating Business Unit_Supplier ID* following the standard format, 5-digit Business Unit_10-digit Supplier ID from PeopleSoft Financials (Example: 00700_0000121997) in the Award/Contract number field only.
 - If unknown, leave blank. See [Section 7 – Managing a Subrecipient](#) to add later.
- j. **PO Number:** Option to enter the Purchase Order (PO) number.
- Project Type:** Utilize the dropdown menu and indicate if the project is a Construction or Non-Construction project.



EIN: (15-1234567)

Award/Contract Number:

PO Number:

Project Type:

- k. **Performance Period Start** *: Utilize the calendar feature to enter the performance period start date.
- l. **Performance Period End** *: Utilize the calendar feature to enter the performance period end date.
- m. **View/Edit Award Budget**: Click *Award Budget* to view the submitted budget. Review the Budget and make changes as needed to the individual budget categories and click *Save*. Then return to the **Program Detail** page and the **Total Budget Requested** should be updated.
- n. **Subrecipient Award**: Enter the subrecipient award for each funding source this total amount should match the **Total Budget Requested**.
- o. **Match Type**: From the dropdown list select one of the appropriate options: *None*, *Cash*, *In-Kind*, *Cash/In-Kind*. Based on the selection the corresponding match total field(s) will be enabled. Enter the match amount for each corresponding field and will be added together as the **Total Match**.

Performance Period Start:*  Performance Period End:* 

[View/Edit Award Budget: Award Budget](#)

Total Budget Requested: \$0.00 [Refresh Award Total](#)
 Total Match Requested: \$0.00

Allocate Funding:

	Total Funding	Funding Available	Subrecipient Award
US5600 Postsecondary Education Programs (Title III and Title V): Eligibility Designations and Applications for Waiving Eligibility Requirements - FY 2023	\$ 700,000.00	\$ 425,000.00	\$ 0.00
Award Total			\$ 0.00

Match Type: Total Match

Cash Match Total: \$ 0.00 In-Kind Match Total: \$ 0.00

- p. **Frequency (Financial Report)**: Define the frequency of the Financial Report task from the dropdown list: *N/A*, *Monthly*, *Weekly*.
- q. **Frequency (Activity Report)**: Define the frequency of the Activity Report task from the dropdown menu: *N/A*, *Monthly*, *Weekly*.

Define an optional frequency for the Financial Report task 

[Reset to program default](#)

Frequency:

Define an optional frequency for the Activity Report task 

[Reset to program default](#)

Frequency:

- r. **Closeout Task Due Date** *: Utilize the calendar feature to enter the due date for the closeout task. Initially this date will auto populate to 90 days after the date entered for "Performance Period End Date". A new date can be entered in the field.
- s. **Closeout Task Reminder Date** *: Utilize the calendar feature to enter the due date for the closeout task reminder. Like the Closeout Task Due Date, this field will auto populate to 90 days after the date entered for "Performance Period End Date". A new date can be entered in the field.

Define dates for the closeout task 

[Reset to program default](#)

Closeout Task Due Date: * 

Closeout Task Reminder date: * 

- t. **Award Notification File**: This file is automatically created by the eCivis Grants Network and is sent to the applicant when they are notified.

Award Notification Letter

Dear Applicant ,

Congratulations! This is to inform you that your application is now awarded.

Project: Bemidji School Elementary District - Title IV

Program: State of Indiana Title IV (V2)

Notification Date:

Approval Date: 03/17/2023

Approved Amount: \$95,000.00

Federal Awards:

- US5600 Postsecondary Education Programs (Title III and Title V): Eligibility Designations and Applications for Waiving Eligibility Requirements - FY 2023: \$95,000.00
 - Agency: U.S. Department of Education
 - Fiscal Year: 2023
 - CFDA/ALN: 84.031H

Total Federal: \$95,000.00



Other Awards: No non-federal funds were included in this award.

Total Match: \$0.00

Period of Performance: 04/16/2023 - 12/31/2023



- u. **Award Files – External**: Attach any relevant files needed by the subrecipient to finalize the award recommendation. These files may include signed agreements, tax forms, financial forms, relevant eCivis Grants Network User Guides, etc.



Award Files - External:
Please upload any files necessary to finalize your award recommendation approval. This may include signed agreements, tax forms, and other files provided by the grantor. These files will be provided to the subrecipient.

- v. **Award Files – Internal**: Attach any relevant files related to this subrecipient. NOTE: these files will NOT be seen by the subrecipient and can only be viewed internally.

Award Files - Internal:
Please upload any files necessary to communicate internally about your award recommendation. These files will NOT be provided to the subrecipient, but will become a part of their award for internal display only.

Once all required information is provided, click the *Send for Approval button* . This award will now follow the **Recommendation Approval** workflow defined in the program’s solicitation. If the Award Recommendation is missing information or is not ready for approval, click the *Save button*  and edit the award recommendation later.

NOTE: Additional fields may appear when creating the **Award Recommendation** if **Goals** or **Detailed Financial Reporting** were utilized in the **Solicitation**.

- 5) On the **Program Detail** page, the newly created recommendation will appear in the **Award Recommendation Approval** section. The **Current Approver** will now be assigned this task to complete.

Award Recommendation Approval

Project	Org Name	Award/ Contract Number	Award Approved	Links	Actions
Central Unified School District - Title IV	Central Unified School District	DOE-FY23-00002	\$50,000.00	Award Package Application Budget	Actions
Southwestern School District Application	Southern School District	DOE-FY23-00007	\$0.00	Award Package Application Budget	Actions

Showing 1 to 2 of 2 entries

- 6) The approver can now review and verify the information in the award recommendation is correct by opening each of the form links:
 - a. **Award Package** – This link is the award recommendation previously created. The Approver should carefully review this information to ensure all data was input correctly. Specifically verifying the **Award Details**, **Internal Note**, **Award Total**, and the **External/Internal Files** are correct.
 - b. **Application** – This link accesses the application submitted by the applicant in Zengine and can only be viewed by Zengine workspace members.
 - c. **Budget** – This link accesses the budget submitted by the applicant.
 - d. **Goals** – If the solicitation utilized Goals, this link would appear to view goals, subgoals, and target units.

Award Recommendation Approval

Project	Org Name	Award/ Contract Number	Award Approved	Links	Actions
Southwestern School District Application	Southern School District	DOE-FY23-00007	\$0.00	Award Package Application Budget	Actions

Showing 1 to 2 of 2 entries

- 7) Once the review of the Award Recommendation is completed, the approver will select the appropriate action from the **Actions** column options below.
 - a. **Return for Changes:** Click this option if errors are found in the **Award Package**. Enter a comment clearly stating the reason why the award recommendation is being returned to the Agency eCivis user who created the award recommendation.
 - b. **Decline Award:** write a comment and send a denial notice to the applicant.

- c. **Approve**: Select the checkbox and click the *Approve button* Approve. Enter a comment in the text box and click *OK* to send the award notification to the applicant.

Award Recommendation Approval

Project	Org Name	Award/ Contract Number	Award Approved	Links	Actions
Central Unified School District - Title IV	Central Unified School District	DOE-FY23-00002	\$50,000.00	Award Package Application Budget	<input type="checkbox"/> Return For Changes Decline Award
Southwestern School District Application	Southern School District	DOE-FY23-00007	\$0.00	Award Package Application Budget	

Showing 1 to 2 of 2 entries

Reload Approve

- 8) The award package, application, and budget will be sent to the applicant for review. Once the applicant reviews the award package, application, and budget, the applicant will send the award back to the Agency eCivis User for Final approval. The **Recommendation Status** will be **Pending Acceptance** on the **Program Details** page.

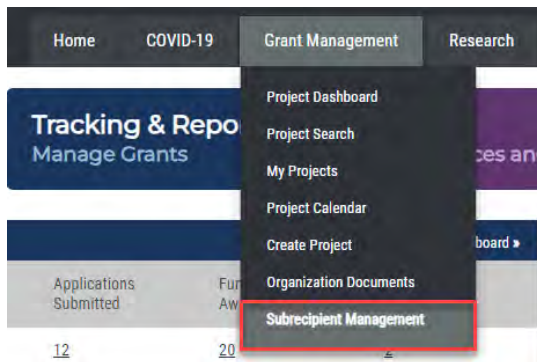
Pending Awards

Include Rejected Awards

Project	Org Name	Award Manager	Award/ Contract Number	Recommendation Status	Current Approver	Actions
Hull Middle School State of Indiana Title IV (V2)	Hull Middle School	S. Sanchez	DOE-FY23-00004	Pending Acceptance	N/A	View Award Package
Central Unified School District - Title IV	Central Unified School District	S. Sanchez	DOE-FY23-00002	Pending Recommendation Approval	Alec Eulano	View Application View Budget

Section 6 – Final Award Approval

- 1) Following applicant responses, Agency eCivis users will click *Subrecipient Management* from the **Grant Management** tab on the eCivis Grants Network homepage.



- 2) From the **Program Dashboard** page, the Agency eCivis user will select the appropriate program title.

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) On the **Program Detail** page, the Agency eCivis user will scroll down to the **Pending Awards** section to review any actions taken by applicants.

Pending Awards ☐ Include Rejected Awards

Project	Org Name	Award Manager	Award/ Contract Number	Recommendation Status	Current Approver	Actions
Central Unified School District - Title IV	Central Unified School District	A. User	DOE-FY23-00002	Pending Recommendation Approval	Agency eCivis User	Actions
Hull Middle School State of Indiana Title IV (V2)	Hull Middle School	A. User	DOE-FY23-00004	Pending Acceptance	Agency eCivis User	Actions
Northern School District - Title IV	Northern School District	A. User	DOE-FY23-00005	Pending Recommendation Approval	Agency eCivis User	Actions
Southwestern School District Application	Southern School District	A. User	DOE-FY23-00007	Pending Final Approval	Agency eCivis User	Actions

Showing 1 to 4 of 4 entries

[Previous](#) [Next](#) [Reload](#)

- a. If the applicant requested changes, their **Recommendation Status** will update to **Subrecipient Changes Requested**. Click **Actions** and *Edit Recommendation* to view the changes requested.

Central School District	Central School District	A. User	DOE-FY23-00008	Subrecipient Changes Requested	N/A	Actions
-------------------------	-------------------------	---------	----------------	---------------------------------------	-----	----------------

Showing 1 to 5 of 5 entries

[Previous](#) [Next](#) [Reload](#)

- [Edit Recommendation](#)
- [View Award Package](#)
- [View Budget](#)

- The **Award Recommendation Approval Task Creation** form will appear with **Changes Requested** noted at the top of the page.

Program Detail

State of Indiana Title IV (V2) Published

Department: Agency A

Total Funding: \$700,000.00

Application Period: 03/01/2023 - 08/31/2023

Award Recommendation Approval Task Creation

Changes Requested: Changes requested will be listed here.

Recipient: Central School District

Project: Central School District

Subrecipient: ? N/A

Subrecipient Risk: - Select Risk -

Award Manager: Agency eCivis User

External Note:* external

1000 characters remaining.

Internal Note:* internal

1000 characters remaining.

- To update the award recommendation with requested changes, or to remove any made changes, follow the instructions provided in [Section 4 – Creating and Approving an Award Recommendation](#).

b. If the applicant accepts their award, the **Recommendation Status** will update to **Pending Final Approval**.

Central School District	Central School District	A. Eulano	DOE-FY23-00008	Pending Final Approval	Alec Eulano	Actions
-------------------------	-------------------------	-----------	----------------	------------------------	-------------	-------------------------

- This triggers the final approval workflow and creates a **Pending Task** for the first approver titled **Final Award Approval**. From the **Actions** column click *Review*.

Pending Tasks

Project	Org Name	Award/Contract Number	Task Type	Reporting Period	Award Type	Invoice Number	Current Status	Submitted Date	Actions
Northeastern School District Application	Northeastern School District Application	DOE-FY23-00006	Subrecipient Amendment Approval		N/A		Pending Approval	07/25/2023	Actions
Southwestern School District Application	Southern School District	DOE-FY23-00007	Final Award Approval		N/A		Final Award Approval	08/05/2023	Actions
Central School District	Central School District	DOE-FY23-00008	Final Award Approval		N/A		Final Award Approval	08/09/2023	<div style="display: flex; justify-content: space-between;"> Actions Review </div>

- The **Award Approval** page will appear allowing the approver to review the award details, note from the applicant, budget, and award files to verify all

information is accurate and complete. Once the award is reviewed one of the following actions may be taken:

- **Approve** [Approve](#) : If the award package is accurate and complete click *Approve* and this task will be sent to the next approver in the workflow. Once the final approver clicks *Approve* the award will be finalized and the entity will be notified.
- **Return to Applicant** [Return to Applicant](#) : If any changes need to be made to the award package taking this action will notify the subrecipient to log-in to the eCivis Grants Portal and make the requested changes.
- **Decline** [Decline](#) : If the Indiana State Agency wishes to no longer award this applicant select *Decline* to notify the applicant of the final decision.

4) Once the **Final Award Approval** is completed, the applicant becomes a Subrecipient and will now appear in the **Subrecipient Awards** section of the **Program Detail** page.

Subrecipient Awards

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

Section 7 – Managing a Subrecipient

- 1) Navigate to the specific **Subrecipient Detail** page to review the Award Details and manage the subrecipient award utilizing the features available on this page. This can be found by clicking the respective title in the **Subrecipient Awards** table.

Subrecipient Detail

Award Detail

<p>Subrecipient: Vendor ID: 325178 Organization Project: Award Manager: Award Status: Awarded Approval Date: 01/28/2023 - View Approval Workflow Approved Amount: \$360,000.00 <input type="text"/> Total Federal Award: \$360,000.00 Total Other Award: \$0.00 Total Match: \$85,000.00 Performance Period: 01/01/2022 - 12/30/2024</p>	<p>Program: Award/Contract Number: CDBG2022-004 Subrecipient Risk: Medium Award Type: N/A</p>
---	--

Manage Subrecipient ▾
Financial Tasks ▾
Programmatic Tasks ▾
Subrecipient Monitoring

- 2) Below this section are the View/Edit buttons as follows:

- a. **Manage Subrecipient**

- **Subrecipient Details:** View/edit subrecipient details such as the eCivis Project Name, Org Name, Performance Period dates, etc.
- **Award Files:** View/upload external and internal files.
- **Add a Miscellaneous Task:** Create a miscellaneous task for the eCivis project team by providing all the required information in the form.
- **Add a Monitoring Task:** Create a miscellaneous task for the eCivis project team by providing all the required information in the form.
- **Create Amendment:** Create an amendment for the award by providing all the required information in the form and sending it for approval. Note the approval workflow will follow the process previously outlined in the program solicitation.

Subrecipient Detail

Award Detail

<p>Organization: Bemidji School Elementary District Project: Bemidji School Elementary District - Title IV Award Manager Award Status: Awarded Approval Date: 03/17/2023 - View Approval Workflow Approved Amount: \$95,000.00 <input type="text"/> Total Federal Award: \$95,000.00 Total Other Award: \$0.00 Total Match: \$0.00 Performance Period: 04/16/2023 - 12/31/2023</p>	<p>Program: State of Indiana Title IV (V2) - Award/Contract Number: DOE-FY23-00001 Award Type: N/A</p>
---	---

Manage Subrecipient ▾
Financial Tasks ▾
Subrecipient Monitoring

Subrecipient Details
 Award Files
 Add A Miscellaneous Task
 Add A Monitoring Task

ce	Reimbursement	Total Disbursed	Pending Disbursement
	\$ 0.00	\$ 0.00	\$ 0.00

b. Financial Tasks

- **Add Payment:** Complete the required information by providing the Payment Date and Allocation Amount to save a payment.
- **Adjust Funding Source:** If there are multiple funding sources for this program utilize this feature to reallocate award funding.
- **View Budget:** View the budget submitted in the application.

Subrecipient Detail

Award Detail

Organization: Bemidji School Elementary District	Program: State of Indiana Title IV (V2)
Project: Bemidji School Elementary District - Title IV	Award/Contract Number: 00700_0000121997_00700
Award Manager:	EIN: 12-1234567
Award Status: Awarded	Award Type: N/A
Approval Date: 03/17/2023 - View Approval Workflow	
Approved Amount: \$95,000.00 +	
Total Federal Award: \$95,000.00	
Total Other Award: \$0.00	
Total Match: \$0.00	
Performance Period: 04/16/2023 - 12/31/2023	

Manage Subrecipient | Financial Tasks | Subrecipient Monitoring

	Advance	Reimbursement	Total Disbursed	Pending Disbursement
Total Disbursed	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

c. Programmatic Tasks: This tab appears if Goals/Metrics were created in the Solicitation set-up.

Subrecipient Detail

Award Detail

Subrecipient: Vendor ID: 325178 Organization: Project: Award Manager: Award Status: Awarded Approval Date: 01/28/2023 - View Approval Workflow Approved Amount: \$360,000.00 + Total Federal Award: \$360,000.00 Total Other Award: \$0.00 Total Match: \$85,000.00 Performance Period: 01/01/2022 - 12/30/2024	Program: Award/Contract Number: Subrecipient Risk: Medium Award Type: N/A
--	--

Manage Subrecipient | Financial Tasks | Programmatic Tasks | Subrecipient Monitoring

View Goals

	Advance	Reimbursement	Total Disbursed	Pending Disbursement
Total Disbursed	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

d. Subrecipient Monitoring: Click this button to be taken to the Subrecipient Monitoring page within the eCivis Grants Network.

Subrecipient Detail

Award Detail

Organization: Bemidji School Elementary District
 Project: Bemidji School Elementary District - Title IV
 Award Manager:
 Award Status: Awarded
 Approval Date: 03/17/2023 - [View Approval Workflow](#)
 Approved Amount: \$95,000.00 +
 Total Federal Award: \$95,000.00
 Total Other Award: \$0.00
 Total Match: \$0.00
 Performance Period: 04/16/2023 - 12/31/2023

Program: State of Indiana Title IV (V2)
 Award/Contract Number: DOE-FY23-00001
 Award Type: N/A

Manage Subrecipient ▾ Financial Tasks ▾ **Subrecipient Monitoring**

3) The financial summary provides an overview of the subrecipient award's financial status.

	Advance	Reimbursement	Total Disbursed	Pending Disbursement
Total Disbursed	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

	Spend	Match	Spend + Match	% Match
Total Approved	\$ 95,000.00	\$ 0.00	\$ 95,000.00	0 %
Total Spend	\$ 0.00	\$ 0.00	\$ 0.00	0 %
Total Remaining	\$ 95,000.00	\$ 0.00	\$ 95,000.00	0 %

Program Income	Received	Expended	Balance
	\$ 0.00	\$ 0.00	\$ 0.00

4) The **Award Activity** section is a record of all the miscellaneous tasks and submitted financial/activity reports associated with this award. The **Actions** column within this table gives the options to either *View Task* or *Change Task Owner*. There are some additional options for the Agency eCivis user to select here depending on task type and approval type.

a. For example, if it is a **Financial Report** or **Activity Report** the Agency eCivis user can select from the following:

- View Report
- Return to first approver
- Return to last approver
- Reopen to Subrecipient

Award Activity

Show 10 entries

Search:

Activity	Reporting Period	Submit Date	Invoice Number	Current Status	Actions
FFATA (Internal)		03/17/2023		Assigned to Task Owner	Actions
Monitoring		05/04/2023		Draft	View Task Change Task Owner

5) The **Subrecipient Pending Tasks** section provides details on the Activity and Financial Reports for this subrecipient. The *Redefine Financial Report Tasks* and *Redefine Activity Report Tasks* enable the Agency eCivis user to adjust the frequency of each task.

Subrecipient Pending Tasks

[Redefine Financial Report Tasks](#) [Redefine Activity Report Tasks](#)

Show 10 entries

Search:

Task Type	Due Date	Actions
Financial Report Approval (Closeout)	03/30/2024	Actions

Showing 1 to 1 of 1 entries

[Previous](#) [Next](#)

[Reload](#)

- 6) The **Award Amendments** table is a record of all the amendments along with their statuses associated with the award. Clicking on hyperlinks within this table will provide view only access if an amendment must be reviewed/approved go to the **Pending Tasks** table on the **Program Detail** page.

Award Amendments

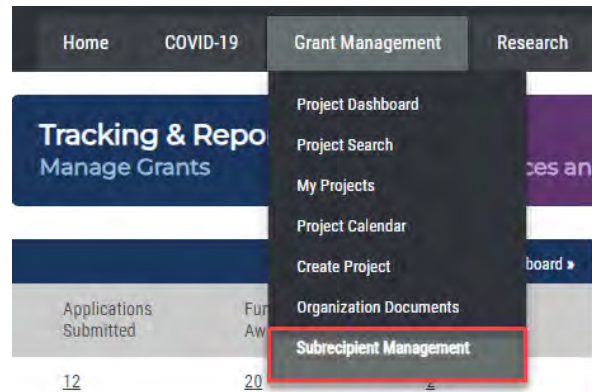
Search:

Amendment Date	Amendment Type	Current Status	Actions
There are no amendments for this award.			

Showing 0 to 0 of 0 entries

Section 8 – Reviewing/Approving Activity Reports

- 1) When a subrecipient submits an **Activity Report**, a new pending task will appear on the **Program Details** page and the approver(s) in the Activity Report Workflow will receive an email notification. To review this report, navigate to the subrecipient by selecting *Subrecipient Management* from the **Grant Management** tab.



- 2) On the **Program Dashboard** page, the Agency eCivis user will click the appropriate Title from the **Program Solicitations** table.

Program Solicitations 🔍 ☑️ Hide Archived Programs

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

- 3) The **Program Detail** page will appear scroll down to the **Pending Tasks** table. The Task Type will display **Activity Report Approval** if you are the approver in the **Actions** column, click Review.

Pending Tasks

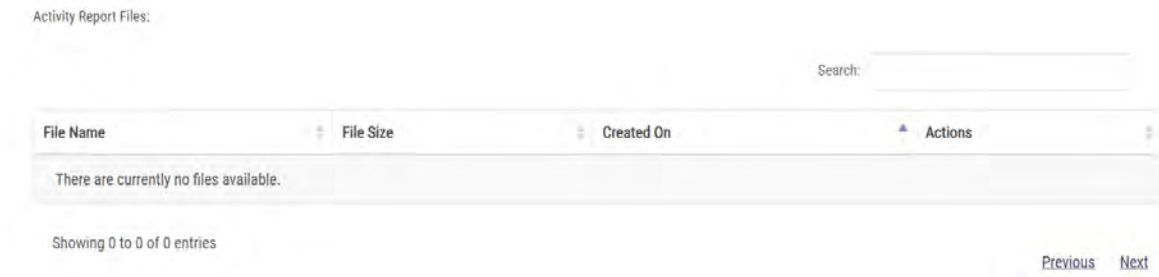
Project	Org Name	Award/Contract Number	Task Type	Reporting Period	Award Type	Invoice Number	Current Status	Submitted Date	Actions
Northeastern School District Application	Northeastern School District Application	DOE-FY23-00006	Subrecipient Amendment Approval		N/A		Pending Approval	07/25/2023	Actions
Northeastern School District Application	Northeastern School District Application	DOE-FY23-00006	Financial Report Approval (Closeout)	07/01/2023 - 07/27/2023	N/A		Pending Approval	07/26/2023	Actions
Central School District	Central School District	DOE-FY23-00008	Activity Report Approval	08/01/2023 - 08/31/2023	N/A		Pending Approval	08/09/2023	Actions Review

The Activity Report page will contain the following sections for review:

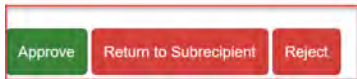
- a. **Subrecipient Detail:** This provides a summary of the subrecipient award.
- b. **Activity Report Details:** This section will provide details to review on the *Reporting Period* along with an *Activity Report Narrative* inputted by the subrecipient.
- c. **Activity Report Goals:** If Goals were created in the solicitation, review the **Completed Units** input for **Goals** and **Subgoals**.

NOTE: This section will only appear if Goals were created in the Program Solicitation.

- d. **Activity Report Files:** This final section is where approvers can view any uploaded documentation (if uploaded) from the subrecipient.

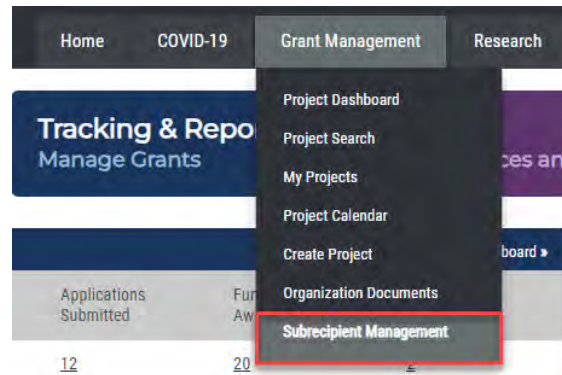


- 4) Once the **Activity Report** review is completed select one of the following options:
- Approve** Approve: This sends the report to the next approver and follows the approval workflow defined in the Program Solicitation. Once the final approval is given, this report will be marked *Approved*, and a notification will be sent to the subrecipient.
 - Return to Subrecipient** Return to Subrecipient: If edits must be made to this report, click this option to return the report to the subrecipient. Once all changes are made, they may re-submit and progress through the approval workflow, again.
 - Reject** Reject: If the report must be rejected and completely restarted, select this option to notify the subrecipient. Once the report is completed, they may re-submit and progress through the approval workflow, again.



Section 9 – Reviewing/Approving Financial Reports

- 1) When a subrecipient submits a **Financial Report**, a new pending task will appear on the **Program Details** page and the approver(s) in the Financial Report Approval Workflow will receive an email notification. To review this report, navigate to the subrecipient by selecting *Subrecipient Management* from the **Grant Management** tab.



- 2) On the **Program Dashboard** page, the Agency eCivis user will click the appropriate *Title* from the **Program Solicitations** table.

Program Solicitations 🔍 ☑ Hide Archived Programs

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

- 3) The **Program Detail** page will appear scroll down to the **Pending Tasks** table. The **Task Type** will display **Financial Report Approval** if you are the approver in the **Actions** column, click *Review*.

Pending Tasks

Project	Org Name	Award/ Contract Number	Task Type	Reporting Period	Award Type	Invoice Number	Current Status	Submitted Date	Actions
Northeastern School District Application	Northeastern School District Application	DOE-FY23-00006	Subrecipient Amendment Approval		N/A		Pending Approval	07/25/2023	Actions
Northeastern School District Application	Northeastern School District Application	DOE-FY23-00006	Financial Report Approval (Closeout)	07/01/2023 - 07/27/2023	N/A		Pending Approval	07/26/2023	Actions
Central School District	Central School District	DOE-FY23-00008	Activity Report Approval	08/01/2023 - 08/31/2023	N/A		Pending Approval	08/09/2023	Actions
Central School District	Central School District	DOE-FY23-00008	Financial Report Approval	08/01/2023 - 08/31/2023	N/A		Pending Approval	08/09/2023	Actions Review


The **Financial Report** page will contain the following sections for review:

- a. **Subrecipient Detail:** provides a summary of the subrecipient award.
- b. **Financial Report Details:** provides details to review on the *Reporting Period*, *Invoice number*, *Receiver ID*, *Budget*, and *Amount Requested for Reimbursement*.
- c. **Financial Report Narrative:** review any notes provided by the subrecipient.

- d. **Financial Report Files:** where approvers can view any uploaded documentation (if uploaded) from the subrecipient.



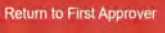


Financial Report Files:

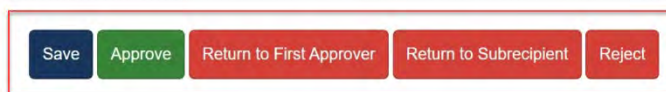
Search:

File Name	File Size	Created On	Actions
Test Document.pdf	776.0 bytes	08/09/2023	

Showing 1 to 1 of 1 entries

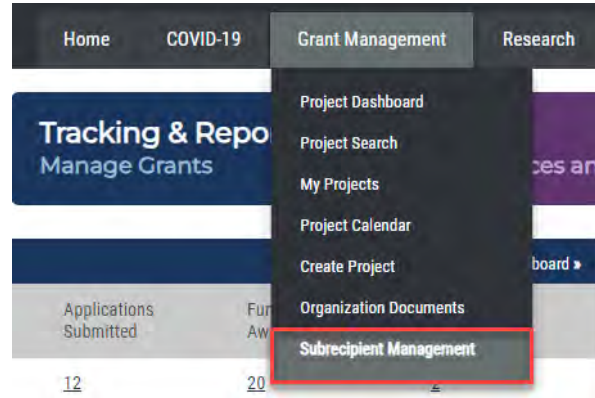
[Previous](#) [Next](#)

- 4) Once the Financial Report review is completed select one of the following options:
- Save** : This allows the user to save changes and complete the review later.
 - Approve** : This sends the report to the next approver and will follow the approval workflow defined in the Program Solicitation. Once the final approval is given this report will be marked Approved and a notification will be sent to the subrecipient.
 - Return to First Approver** : This will only appear if this is a sequential approval workflow and can be returned to a previous approver for modifications.
 - Return to Subrecipient** : If edits must be made to this report click this option to return the report to the subrecipient. Once all changes are made, they may re-submit and progress through the approval workflow again.
 - Reject** : If this report must be completely restarted select this option to notify the subrecipient. Once the report is completed, they may re-submit and progress through the approval workflow again.



Section 10 – Initiating Grantor Amendments

- 1) The Grantor Indiana State Agency can initiate an amendment to make changes to a subrecipient's period of performance end date, budget, or goals. To begin this process, navigate to the subrecipient by selecting *Subrecipient Management* from the **Grant Management** tab.



- 2) On the **Program Dashboard** page, the Agency eCivis user will click the appropriate *Title* from the **Program Solicitations** table.

Program Solicitations ? Hide Archived Programs

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

- 3) On the **Program Detail** page, click the respective title in the **Subrecipient Awards** table to navigate to the *Subrecipients Detail* page.

Subrecipient Awards

Project	Organization	Award Manager	Award/Contract Number	Award Type	Status	Contract Start	Contract End	Total Award
Remidji School Elementary District - Title IV	Bemidji School Elementary District	S. Sanchez	DOE-FY23-00001	N/A	Awarded	04/16/2023	12/31/2023	\$95,000.00
Central School District	Central School Distrit	A. Eulano	DOE-FY23-00008	N/A	Awarded	08/01/2023	08/31/2023	\$1,000.00
Northeastern School District Application	Northeastern School District Application	A. Eulano	DOE-FY23-00006	N/A	Closeout	05/01/2023	11/30/2023	\$130,000.00
Southwestern School District Application	Southern School District	A. Eulano	DOE-FY23-00007	N/A	Awarded	07/01/2023	07/31/2024	\$0.00

- 4) Click the *Manage Subrecipient button*  and select *Create Amendment* from the dropdown menu.

Subrecipient Detail

Award Detail

Organization: Bemidji School Elementary District
 Project: Bemidji School Elementary District - Title IV
 Award Manager: Agency eCivis User
 Award Status: Awarded
 Approval Date: 03/17/2023 - [View Approval Workflow](#)
 Approved Amount: \$95,000.00 +
 Total Federal Award: \$95,000.00
 Total Other Award: \$0.00
 Total Match: \$0.00
 Performance Period: 04/16/2023 - 12/31/2023


Program: State of Indiana Title IV (V2)
 Award/Contract Number: DOE-FY23-00001
 Award Type: N/A

Manage Subrecipient **Financial Tasks** **Subrecipient Monitoring**

Subrecipient Details
 Award Files
 Add A Miscellaneous Task
 Add A Monitoring Task
Create Amendment

Reimbursement	Total Disbursed	Pending Disbursement
\$ 0.00	\$ 0.00	\$ 0.00

NOTE: This option will not appear if there are any Financial Reports or Grant Amendments in Draft or Pending Approval status.

- 5) The Amendment page will appear with **Award Details** at the top of the page followed by the **Amendment details** section. All fields on this page will be auto populated with the information inputted when awarded. In this section an Agency eCivis user can begin specifying their amendment by adjusting any of the following fields.
- If adjusting the **Performance Period End*** date, click the *calendar icon*  and update this field with the new end date.
 - If adjusting the **Budget**, select the checkbox *This amendment includes a financial change*.
 - If adjusting a **Goal**, select the checkbox *This amendment includes a goal change*.

Performance Period End:* 12/31/2023 

Award/Contract Number: DOE-FY23-00001

This amendment includes a financial change

- 6) Based on previous selections, the following links will appear so the Agency eCivis user may amend the **Budget** and/or **Goals**, as applicable. If only amending the **Performance Period end** date, proceed to the next step.
- Amendment Budget** – allows changes to be made to the Subrecipient’s budget.
 - Award Budget (Active)** – provides view-only access of the current budget and is not editable.
 - Refresh Award Total** – updates the **Total Budget Requested** and will reflect any saved changes entered in the **Amendment Budget**.
 - Amendment Goals** – allows changes to Target Units for Goals/Subgoals.

- e. **Refresh Goals** – loads the **Amendment Goals** table and will provide a view of **Proposed** and **Current Target Units** for review.

This amendment includes a financial change

View/Edit Amendment Budget: [Amendment Budget](#) [Award Budget \(Active\)](#)

Total Budget Requested: \$0.00 [Refresh Award Total](#)
 Total Match Requested: \$0.00

Amendment Files - External:
 Please upload any files necessary to finalize your amendment. This may include signed agreements, tax forms, and other files provided by the grantor. These files will be provided to the subrecipient.

[Attach Files](#)

Search:

File Name	File Size	Created On	Actions
There are currently no files available.			

Showing 0 to 0 of 0 entries

[Previous](#) [Next](#)

[Save Amendment](#) [Send for Approval](#) [Cancel](#) [Delete](#)

- 7) The files section allows the Agency eCivis user to attach any relevant files in the **Amendment Files - External** section for the subrecipient, or **Amendment Files – Internal** for the Indiana State Agency.

Amendment Files - External:
 Please upload any files necessary to finalize your amendment. This may include signed agreements, tax forms, and other files provided by the grantor. These files will be provided to the subrecipient.

[Attach Files](#)

Search:

File Name	File Size	Created On	Actions
There are currently no files available.			

Showing 0 to 0 of 0 entries

[Previous](#) [Next](#)



- 8) The **Amendment Narrative*** section requires the Agency eCivis user to provide the subrecipient with a brief description of the amendment.

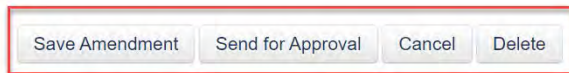
Amendment Narrative:*

You can include a narrative below with any extra information about the amendment.

8000 characters remaining.

- 9) Once the Amendment is completed, select one of the following options:
 - a. **Save Amendment** [Save Amendment](#) – saves the amendment as a draft and may be completed later.
 - b. **Send for Approval** [Send for Approval](#) – This will send the amendment to the next approver and will follow the approval workflow defined in the Program Solicitation. Once the final approval is given, this amendment will be sent to the subrecipient.

- c. **Cancel**  – This will close out the page without saving any changes.
- d. **Delete**  – This will delete drafts of previously saved amendments.



Conclusion

Once the grant program has ended and the subrecipient is ready for closeout, the Agency eCivis user should view the [State of Indiana eCivis Grants Network User Guide - Grant Closeout in eCivis and PeopleSoft](#) for instructions on the closeout process.

Appendix A – Updates to User Guide

February 6, 2024

- [Section 4 – Creating and Approving an Award Recommendation](#) 4) i. modified

June 4, 2024

- [Section 2 – Creating an Application Denial](#) modified to align with [Section 4](#)
- [Section 3 – Viewing an Award](#) moved to precede [Section 4 – Creating an Application Award](#)