



eCivis

**GRANTS NETWORK
EXTERNAL USER GUIDE**

Post-Award Grants Management
for Grantors

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1. Setting Up Your New eCivis Account

1.1. My Account Information page

When you initially log into eCivis Grants Network, you will be taken to the “My Account Information” page. Here, you can change your Account Email Address, Password, User Profile Selections, and Contact Information:

My Account Information

Please review each item below and modify or enter any appropriate information.
Bold * items are required.

User Account Identification

User Name: mopsai@ecivis.com

Email *: mopsai@ecivis.com **1**

2 [Click to change password.](#)

User Role: Organization MAH

User Groups: Activity Report Approval Team, Award Acceptance Team, Award Recommendation Team, Final Award Approval Team, Grant Approval Group, Grant Office

☒ I have reviewed and accept the terms of the [License Agreement](#) *.

User Profile **3**

My grant related responsibilities include (check all that apply):

Management

☒ Managing Grant Professionals ☐ Coordinating Grant Activity

Pre-Award Activities

☐ Defining Projects ☒ Researching Grants

☐ Writing Grant Applications ☐ Preparing Budgets

☐ Managing Grant Funded Projects ☐ Preparing Project/Activity Reports

Post-Award Activities

☐ Preparing Budgets ☒ Managing Grant Funded Projects

☐ Managing Financial Transactions ☐ Preparing Project/Activity Reports

☐ Preparing Financial Reports ☐ Providing Single Audit Support

Other

Please describe your funding needs:

150 Characters Left

User Contact Information **4**

First Name *: Marc Address *: 418 N. Fair Oaks

Last Name *: Opsal Address:

Title *: CSSS City *: Pasadena

State *: CA Zip Code *: 91103

Phone *: 626-578-6206 Ext.:

Department *: Community Development, Economic Development, Fire, Grants Administration Office, Health and Human Services, Housing, IT, Library, Parks and Recreation, Police/Sheriff, Public Works

You can also see to which user groups you are assigned, and which departments you are assigned on this page:

User Account Identification

User Name: mopsai@ecivis.com

Email *: mopsai@ecivis.com

[Click to change password.](#)

1 Role: Organization MAH

User Groups: Activity Report Approval Team, Award Acceptance Team, Award Recommendation Team, Final Award Approval Team, Grant Approval Group, Grant Office

☒ I have reviewed and accept the terms of the [License Agreement](#) *.

User Contact Information

First Name *: Marc Address *: 418 N. Fair Oaks

Last Name *: Opsal Address:

Title *: CSSS City *: Pasadena

State *: CA Zip Code *: 91103

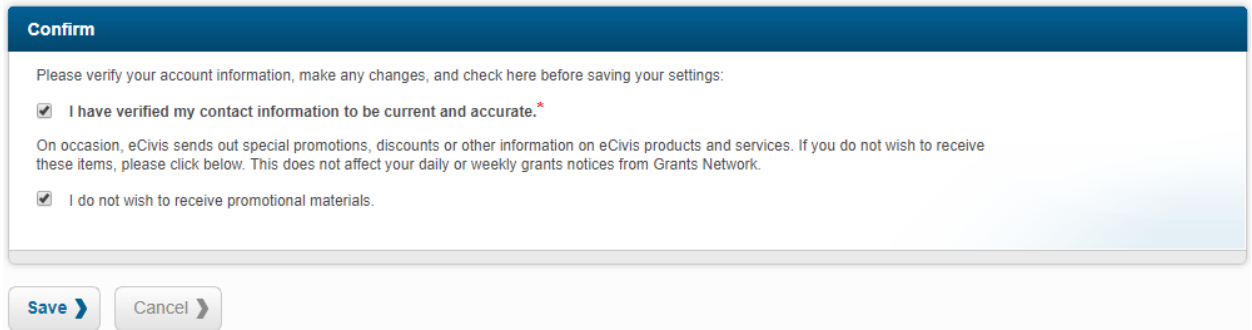
Phone *: 626-578-6206 Ext.:

2

Department *: Community Development, Economic Development, Fire, Grants Administration Office, Health and Human Services, Housing, IT, Library, Parks and Recreation, Police/Sheriff, Public Works

After you have confirmed that information on the My Account Information page, and edited any fields you wish to edit, click the checkbox that reads “I have verified my contact

information to be current and accurate.” You may also check or uncheck the “I do not wish to receive promotional materials” box at this time:



Confirm

Please verify your account information, make any changes, and check here before saving your settings:

☒ I have verified my contact information to be current and accurate.*

On occasion, eCivis sends out special promotions, discounts or other information on eCivis products and services. If you do not wish to receive these items, please click below. This does not affect your daily or weekly grants notices from Grants Network.

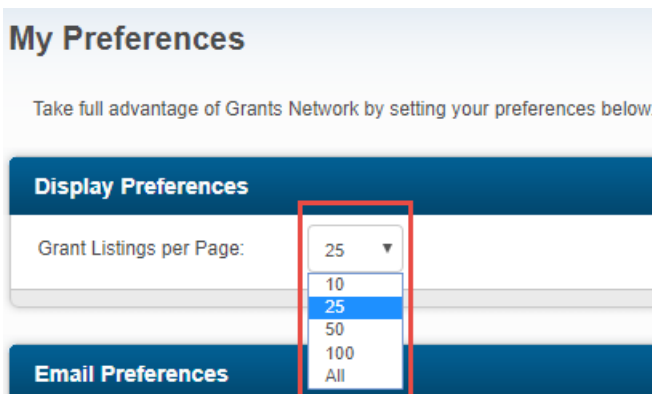
☒ I do not wish to receive promotional materials.

Save > **Cancel** >

1.2. My Preferences Page

When you click “Save” on the My Account Information section, you will automatically be taken to the My Preference page. This page allows you to personalize the way your Grants Network account appears, and how you receive information.

The Display Preferences section determines how many grants you will see listed when you perform a Grant search in the Grants Database within Grants Network. Use the drop-down menu to make your preference selection:



My Preferences

Take full advantage of Grants Network by setting your preferences below.

Display Preferences

Grant Listings per Page: 25 ▼

- 10
- 25
- 50
- 100
- All

Email Preferences

The Email Preferences section allows you to determine how often you wish to receive various types of email messages from your eCivis Grants Network account. Click the radio buttons beside each email type to determine if you want to receive the emails daily, weekly, or not at all:

Email Preferences			
New Grants / Updates Email:	<input type="radio"/> None	<input type="radio"/> Daily	<input checked="" type="radio"/> Weekly
Saved Grants Email:	<input type="radio"/> None	<input checked="" type="radio"/> Daily	<input type="radio"/> Weekly
Search Agent Email:	<input checked="" type="radio"/> Daily	<input type="radio"/> Weekly	
Tasks Email:	<input type="radio"/> None	<input checked="" type="radio"/> Daily	<input type="radio"/> Weekly
Routed Grant Updates Email:	<input checked="" type="radio"/> Yes	<input type="radio"/> No	

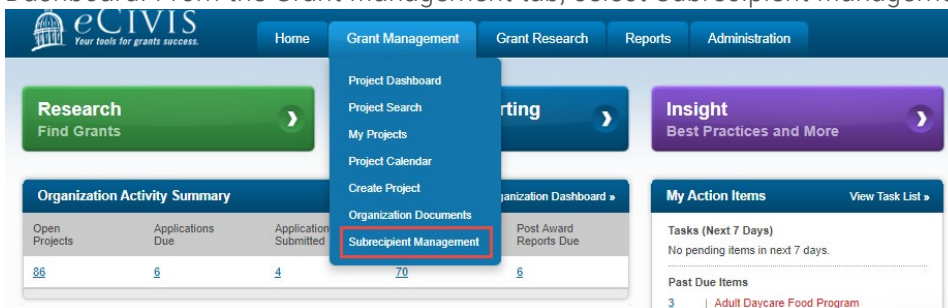
- **New Grants / Updates Email:** This email will inform you of any new grants or grant updates that enter the eCivis Grants Database.
- **Saved Grants Email:** This email alerts you if an update has been made to a grant you have saved (eg: a due date has changed, or the contact information has been updated).
- **Search Agent Email:** This email informs you if any new grants have been added to the eCivis Grants Database that match your saved search agent filters.
- **Tasks Email:** This email sends you an email if you are assigned a task in Grants Network, and/or if you have any overdue tasks that have yet to be completed.
- **Routed Grant Updates Email:** This email informed you if a grant has been sent to you by another users for review. When this occurs, a review task is created for you to ensure that you see a grant that another user thinks may be relevant to the project(s) you are currently trying to fund.

Once you have selected your preferences above, click "Save." This will take you back to the eCivis Grants Network Homepage, which will be the first page you see going forward whenever you log into Grants Network.

2. Approving an Award Recommendation

The *Grantor Pre-Award* manual walks through the process of selecting applications for award recommendation and for denial. After an award recommendation request is submitted within Grants Network, it proceeds to the *Award Recommendation* workflow. The approvers in that workflow must complete the following while the initiator awaits their response:

- 1) If you have been assigned any task for any program, the task will appear on your Program Dashboard. From the Grant Management tab, select Subrecipient Management:



- 2) Under Your Pending Approval Tasks, find the appropriate task and click on *Visit Program*. You can also search for the name of the program, or filter the columns to find the task:

Search:

Your Pending Approval Tasks

Program	Project	Recipient Name	Created Date	Task Type	Action
Workforce Development Program (WDP) Grant - FY 2019	Government Organization Workforce Development Program	David Shea	07/03/2019	Award Recommendation Approval	Visit Program
Workforce Development Program (WDP) Grant - FY 2019	Job Incubator	Ulysses Grant	07/08/2019	Award Response Approval	Visit Program

Showing 1 to 2 of 2 entries

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

- 3) You will be taken to the Program Detail page and the task will appear in the Award Recommendation Approval section:

Award Recommendation Approval

Project	Org Name	Award Approved	Links	Action
Downtown Housing Rehabilitation Project	City of Springfield	\$125,000.00	Award Package Application Budget	Return For Changes

Showing 1 to 1 of 1 entries

[Reload](#) [Approve](#) [Reject](#)

From this page, you can view:

1. The Award Package
2. The Application

3. The Budget

4. And Return the application for changes (if necessary)

- 4) Click “Award Package” to see the files that will be sent to the applicant as part of their award acceptance process:

Award Files

Search:

File Name	Upload Date	File Size	Action
Approval File: awardNotification.pdf	N/A	N/A	Download
ADM-47 Form.xlsx	11/11/2019	171.4 Kb	Download
std213 03.2019.pdf	11/11/2019	37.9 Kb	Download
std215 8.2017.pdf	11/11/2019	55.1 Kb	Download

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

[Close](#)

- 5) Click “Application” to view the applicant’s submission within *Zengine*. You may be asked to login to your *Zengine* account but the link will take you then to the data table of applications:

View: Submissions By Folder Search

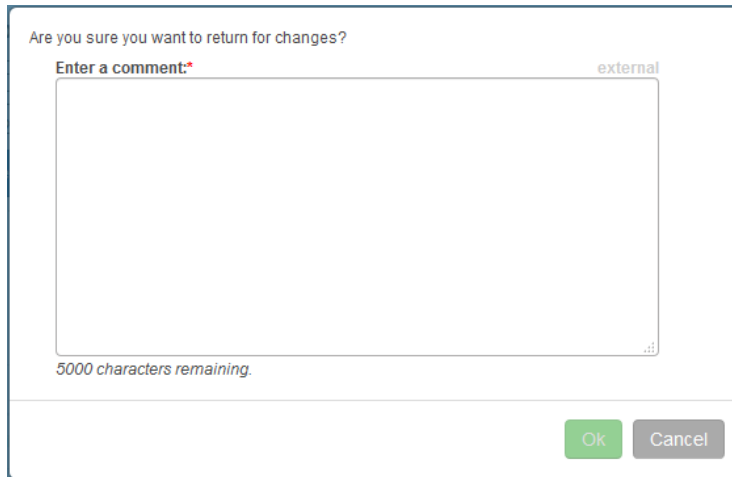
	profileLink	projectTitle	4. Scope of Work	
	kyoung@ecivis.com	Workforce Development - ...	The County of Jay Health D...	12 Mo
	kyoung@ecivis.com	REGION 5 WORKFORCE DE...	1. Further work to more ful...	3 ya
	jdelarorsa@ecivis.com	Test on Kelly's Account	Test	Test
	atorres@ecivis.com	Job Incubator	The grant will only fund a p...	It will
	epistemehayes@gmail.com	Brewery School	Creating a brewery school t...	5 Mo
	jbrayer@cox.net	Youth Employment Educati...	Contract staff to teach clas...	24 w

- 6) Click “Budget” to view the applicant’s budget in a separate webpage:

Application Budget for City of Altadena
 Program: Community Development Block Grant
 Project name: Housing Project for Altadena

Budget Settings		Budget Summary	
Indirect Costs	Not Applicable 0.00 %	\$39,000.00	Total Direct Costs
Match / Cost Share	Not Applicable 0.00 % \$ 0.00	\$0.00	Total Indirect Costs
Budget Stage: Pre-Award		\$39,000.00	Total Amount (Direct + Indirect)
Actions		\$0.00	Match / Cost Share
		\$0.00	Program Income

- 7) Click *Return For Changes* to return to the requestor and indicate which changes need to be made:



Are you sure you want to return for changes?

Enter a comment.* external

5000 characters remaining.

Ok Cancel

- 8) Select the application you want to approve and select *Approve*. Multiple approval requests can be checked off and approved/rejected simultaneously if necessary. You will be able to leave external comments on each approval after selecting to approve:

Award Recommendation Approval

Project	Org Name	Award Approved	Links	Action
Housing Project for Altadena	City of Altadena	\$39,000.00	Award Package Application Budget	Return For Changes

Showing 1 to 1 of 1 entries

Reload Approve Reject

- 9) If you are the last or only approver needed to complete the Award Recommendation Approval task, the applicant will be notified by email that their award has been submitted for their review and acceptance.

3. Approving an Award Response

Once an applicant has accepted their award and responded to an offer. This triggers your Final Award Approval process.

- 1) Under Your Pending Approval Tasks, find the *Award Response Approval* task and click on *Visit Program*. You can also search for the name of the program, or filter the columns to find the task:

Search:

Your Pending Approval Tasks

Program	Project	Recipient Name	Created Date	Task Type	Action
Workforce Development Program (WDP) Grant - FY 2019	Government Organization Workforce Development Program	David Shea	07/03/2019	Award Recommendation Approval	Visit Program
Workforce Development Program (WDP) Grant - FY 2019	Job Incubator	Ulysses Grant	07/08/2019	Award Response Approval	Visit Program

Showing 1 to 2 of 2 entries

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

[Reload](#)

- 2) You will be taken to the Program Detail page and the task will appear in the Pending Approval Tasks section. From the Action column, select *Review Award*:

Search:

Pending Approval Tasks

Project	Recipient Name	Task Type	Submitted Date	Action
Job Incubator	Ulysses Grant	Award Response Approval	07/08/2019	Review Award

Showing 1 to 1 of 1 entries

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

[Reload](#)

- 3) You can view any notes from the subrecipient and download any files from the following page:

Award Files (from applicant):

Search:

File Name	File Size	Created On	Actions
Award Notice Place Holder.docx	11.0 Kb	07/08/2019	Download

Showing 1 to 1 of 1 entries

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

[Approve](#) [Return to Applicant](#) [Decline](#)

- 4) Select *Approve* to complete the task and give final approval to award this applicant as a subrecipient. You can leave any notes or comments on the window that follows:

no accept the award. Thank you for your consideration and time.

Award Files (from applicant):

Search:

File Name	File Size	Created On	Actions
Award Notice Place Holder.docx	11.0 Kb	07/08/2019	Download

Showing 1 to 1 of 1 entries

[Previous](#) [1](#) [Next](#)

[Approve](#)
[Return to Applicant](#)
[Decline](#)

- 5) If you have completed the Award Recommendation Approval task, the subrecipient will be moved from Pending Approval Task to the Subrecipient section:

No approval tasks require your attention. Click the reload button to refresh.

[Reload](#)

Show entries

Search:

Subrecipient Awards

Organization	Project	Contract Start	Contract End	Total Award
City of Springfield	Downtown Housing Rehabilitation Project	05/31/2020	06/30/2021	\$125,000.00

Showing 1 to 1 of 1 entries

[Previous](#) [1](#) [Next](#)

4. Navigating the Subrecipient Detail Page

From the Program Detail page, locate the subrecipient application details you want to view, and click on the Project name beneath "Subrecipient Awards":

Subrecipient Awards

Organization	Project	Award ID	Contract Start	Contract End	Total Award
City of Springfield	Downtown Housing Rehabilitation Project	A123-45	05/31/2020	06/30/2021	\$125,000.00

There are 5 primary sections of this page where you can navigate and perform various actions:

4.1. Award Detail Section

This section shows your Award Details, as accepted by the subrecipient and approved by your organization:

Award Detail

Organization: City of Springfield
 Project: Downtown Housing Rehabilitation Project
 Approval Date: 02/12/2020 - [View Approval Workflow](#)
 Approved Amount: \$125,000.00 +
 Total Federal Award: \$60,000.00
 Total Other Award: \$65,000.00
 Total Match: \$10,000.00
 Performance Period: 05/31/2020 - 06/30/2021

Program: Community Development Block Grant
 Award ID: A123-45
 EIN: 123456789

4.2. View/Edit Actions:

[Add Payment](#)
[View/Edit Budget](#)
[Award Files](#)
[Subrecipient Monitoring](#)

Here, you can Add Payments to subrecipients, View/Edit the Budget that has been submitted, view Award Files, and perform Subrecipient Monitoring.

4.3. Financial Summary:

View a financial summary of your approved spending and paid disbursements to date:

	Spend	Match	Spend + Match	% Match
Total Approved	\$ 125,000.00	\$ 10,000.00	\$ 135,000.00	8 %
Total Spend	\$ 5,000.00	\$ 0.00	\$ 5,000.00	0 %
Total Remaining	\$ 120,000.00	\$ 10,000.00	\$ 130,000.00	8 %
Total Disbursement	\$ 0.00			
Payment Balance	\$ -5,000.00			

4.4. Reports

This section lets you view all financial reports submitted by subrecipients, and all payment/reimbursement requests, and the current status of each report (Approved, Pending Approval, Changes Requested, etc.):

Reports

Show entries Search:

Report	Performance Period	Submit Date	Current Status	Actions
Financial Report	02/14/2020 - 02/21/2020	02/13/2020	Approved / Awaiting Payment	View Payment Request View Report
Financial Report	02/14/2020 - 02/28/2020	02/13/2020	Pending Approval	View Report
Financial Report	03/26/2020 - 12/31/2020	02/13/2020	Changes Requested	View Report
Financial Report	03/27/2020 - 04/30/2020	02/13/2020	Rejected	View Report
Activity Report	03/31/2020 - 05/31/2020	02/13/2020	Rejected	

NOTE: If you wish to respond to a pending report approval request, you must return to your Pending Approval Tasks table on the Program Detail page or Program Dashboard

NOTE: Click Reload to refresh this table for any updates that occurred since last you visited this page

4.5. Subrecipient Pending Tasks

This section lets you view all pending tasks from a subrecipient, and lets you: Delete Tasks, or Refine Activity Report Frequency (if you want to change the cadence on which subrecipients submit reports). You can do this by clicking "Actions" beside the task of your choice:

Subrecipient Pending Tasks

[Redefine Financial Report Tasks](#) [Redefine Activity Report Tasks](#) 1

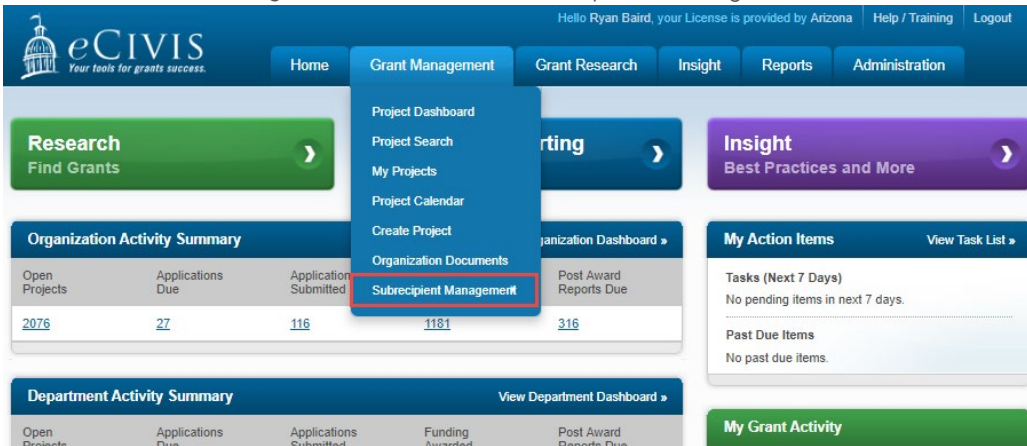
Show entries Search:

Task Type	Due Date	Actions
Financial Report Request	06/30/2020	Actions
Financial Report Request	09/30/2020	Delete Task Redefine Financial Report Frequency
Activity Report Request	09/30/2020	Actions

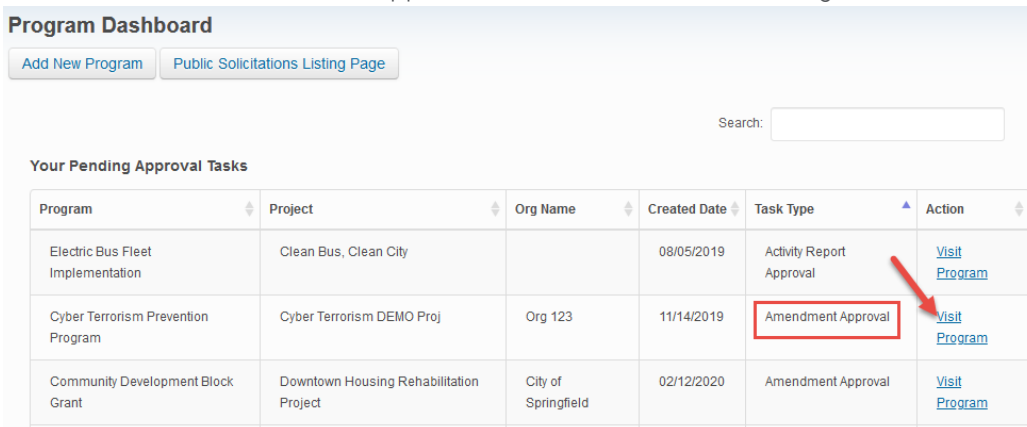
5. Processing a Grant Amendment

Subrecipients are responsible for submitting Grant Amendment requests from Portal when a financial or non-financial amendment is needed.

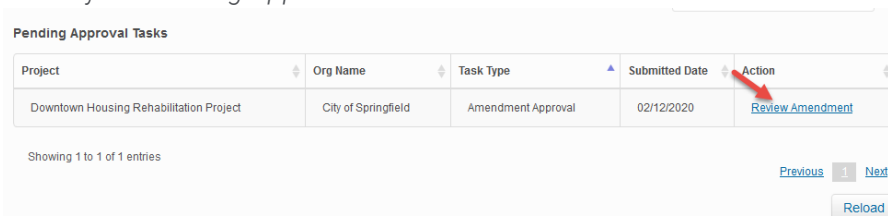
- 1) If you have been assigned a grant amendment for approval it will appear in your Program Dashboard and in the Program Detail page.
- 2) From the Grant Management tab, select *Subrecipient Management*:



- 3) Select one of the amendment approval tasks and click on *Visit Program*:



- 4) Under your *Pending Approval* tasks select *Review Amendment*:



5) On the amendment page you can:

Amendment Details

Award details:

	Proposed	Current
Organization Name:	City of Springfield	(City of Springfield)
Project Name:	Downtown Housing Rehabilitation Prc	(Downtown Housing Rehabilitation Project)
EIN:	123456789	(123456789)
Performance Period End:	06/30/2021	(06/30/2021)
Award ID:	A123-45	(A123-45)

View Budget:

[Award Budget](#) [Amended Budget \(Proposed\)](#)

Allocate Funding:

	Available	Funding Available	Subrecipient Award
ORG0016 Community Development Block Grant	\$ 851,500.00	\$ 791,500.00	\$ 60,000.00
Planning and Community Development General Fund FY2020	\$ 100,000.00	\$ 35,000.00	\$ 65,000.00
Award Total			\$ 125,000.00

Amendment Files:

Search:

File Name	File Size	Created On	Actions
Grant Information Request Form.docx	11.2 Kb	02/12/2020	

Showing 1 to 1 of 1 entries

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

Amendment Narrative:

We have detailed the requested changes of our grant award in the...

Submission Note:

Please see my notes in the attachment

1. View a summary of the subrecipient project.
2. View the original budget.
3. View the proposed budget.
4. Change the overall funding allocation.
5. Review supporting files submitted by the subrecipient for this amendment.
6. Review supporting narrative submitted by the subrecipient for this amendment.
7. Review any additional *Submission Notes*.

- 6) When you are ready you can approve the amendment, reject the amendment or return it to the subrecipient for additional changes and resubmittal:



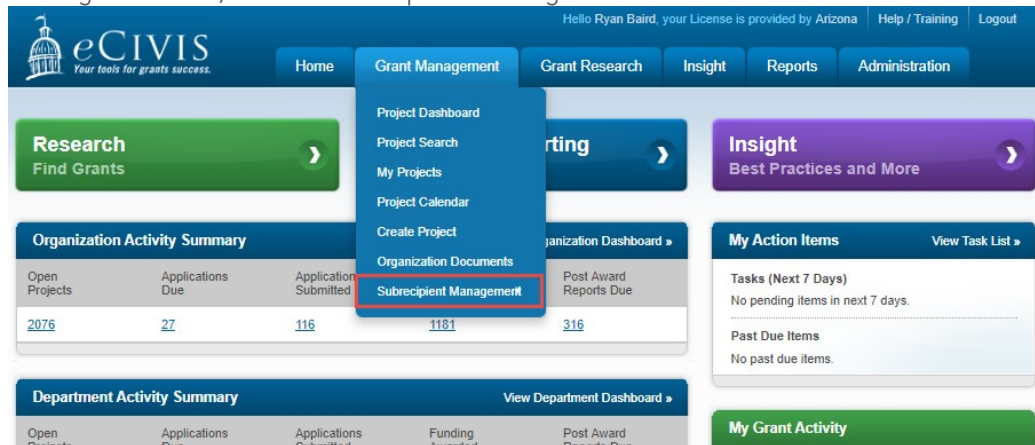
NOTE: Do not select Reject unless you are sure you do not want to allow the subrecipient to resubmit this request.

6. Managing Subrecipient Compliance Reports

When subrecipients complete their assigned report tasks, as confirmed and set during Award Recommendation, approval is then requested.

6.1. Reviewing and Approving Financial Reports

- 1) If you have been assigned in the Edit Solicitation page as part of the Financial Report Approval sequence, the task will appear on your Program Dashboard. From the Grant Management tab, select Subrecipient Management:



- 2) The Financial Report Approval task will appear on the Program Dashboard underneath Your Pending Approval Tasks. Select *Visit Program* next to the appropriate subrecipient:

Search:

Your Pending Approval Tasks

Program	Project	Recipient Name	Created Date	Task Type	Action
Workforce Development Program (WDP) Grant - FY 2019	Government Organization Workforce Development Program	David Shea	07/03/2019	Award Recommendation Approval	Visit Program
Workforce Development Program (WDP) Grant - FY 2019	Job Incubator	Ulysses Grant	07/09/2019	Financial Report Approval	Visit Program

Showing 1 to 2 of 2 entries

[Previous](#) [1](#) [Next](#)

- 3) Under Pending Approval Tasks, select *Review Report*:

Search:

Pending Approval Tasks

Project	Recipient Name	Task Type	Submitted Date	Action
Job Incubator	Ulysses Grant	Financial Report Approval	07/09/2019	Review Report

Showing 1 to 1 of 1 entries

[Previous](#) [1](#) [Next](#)

[Refresh](#)

- 4) Review the spending detail and adjust the amount to be reimbursed accordingly:

Amount Requested for Reimbursement:
\$750.00

Select accounts for payment:

	Available	Amount
General Fund FY19 - Workforce Development	\$ 1,250,000.00	\$ 0.00
Allocation Total		\$ 0.00

Financial Report Narrative:

- 5) If the subrecipient has attached files, you can download them from the *Financial Report Files*:

Financial Report Files:

Search:

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

Showing 0 to 0 of 0 entries

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

- 6) When you are ready, you can approve the report, reject it, or return it to the subrecipient for additional changes and resubmittal:

NOTE: Do NOT select Reject unless you are sure you do not want to allow the subrecipient to resubmit this request.

- 7) Detail the decision for approval and click on *OK*:

Are you sure you want to approve this financial report?

Enter a comment:

Reimbursement approved.

4977 characters remaining.

- 8) Once a response is given, the *Subrecipient* will receive an email notification.

- 9) If you select *Return to Subrecipient* on a Financial Report, you can explain what information is needed and the subrecipient will have the option to resubmit the report. Once the subrecipient has resubmitted the Financial Report, it will appear in your *Pending Approval Tasks* table:

Search:

Pending Approval Tasks

Project	Recipient Name	Task Type	Submitted Date	Action
Job Incubator	Ulysses Grant	Financial Report Approval	07/09/2019	Review Report

Showing 1 to 1 of 1 entries

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

6.2. Tracking Reimbursements and Advance Payments

6.2.1. Tracking an Advance Payment

If you are submitting an advance payment to your subrecipient outside of a report and reimbursement request arrangement, follow the steps below:

- 1) From the Subrecipient Detail, select *Add Payment*:

Approval Date: 00/04/2019
 Approved Amount: \$100,000.00
 Total Federal Award: \$0.00
 Total Other Award: \$0.00
 Total Match: \$0.00
 Period of Performance: N/A - N/A

[Back to Program Detail](#) [Add Payment](#) [View/Edit Budget](#)

	Spend	Match	Sp
Total Approved	\$ 100,000.00	\$ 0.00	\$ 1
Total Spend	\$ 0.00	\$ 0.00	\$ 0
Total Remaining	\$ 100,000.00	\$ 0.00	\$ 1
Total Disbursement			

- 2) Select the payment type: *Allocation/Advance*.
- 3) Enter the payment in the Amount column. The Available amount and total will automatically calculate according to this.

4) Then, click "Save Payment":

Back to Subrecipient Detail

Financial Payment

Select Payment Type:
☒ Allocation / Advance
☐ Reimbursement

Select accounts:

	Available	Amount
Adult Daycare	\$ 249,975.00	\$ 25.00
Allocation Total		\$ 25.00

Save Payment Cancel

6.2.2. Tracking a Reimbursement Payment

After approving a financial report in your *Pending Approval Tasks*, you may mark it as reimbursed.

1) From the Subrecipient Detail, select *Add Payment*:

Approval Date: 00/04/2019
 Approved Amount: \$100,000.00 +
 Total Federal Award: \$0.00
 Total Other Award: \$0.00
 Total Match: \$0.00
 Period of Performance: N/A - N/A

Back to Program Detail **Add Payment** View/Edit Budget

	Spend	Match	Sp
Total Approved	\$ 100,000.00	\$ 0.00	\$ 1
Total Spend	\$ 0.00	\$ 0.00	\$ 0
Total Remaining	\$ 100,000.00	\$ 0.00	\$ 1
Total Disbursement			

NOTE: You can also start the payment process from the Reports table by searching for the approved request you wish to pay. Once found, click "View Payment Request":

Reports

Show 10 entries

Search:

Report	Performance Period	Submit Date	Current Status	Actions
Financial Report	02/14/2020 - 02/21/2020	02/13/2020	Approved / Awaiting Payment	View Payment Request View Report

- 2) Select the Financial Report to be reimbursed. Only approved financial reports will appear here. Then, select *Mark Paid*:

Period of Performance: 07/03/2019 - 07/03/2021

Financial Payment

Select Payment Type:

☐ Allocation / Advance

☒ Reimbursement

Select a financial report:

Period: 05/01/2019 - 05/31/2019

Period 05/01/2019 - 05/31/2019

Fund Amount

Total approved for payment \$

Mark Paid Cancel

- 3) The payments will be recorded in the Reports section of the Subrecipient Detail:

Reports

Show 10 entries

Search:

Report	Date Created	Current Status	Actions
Financial Report 05/01/2019 - 07/05/2019	07/02/2019	Approved	View Report
Financial Report 07/02/2019 - 07/02/2019	07/02/2019	Approved / Paid	View Report
Financial Report 07/01/2019 - 07/31/2019	07/24/2019	Approved / Paid	View Report
Financial Report 08/07/2019 - 08/31/2019	08/07/2019	Rejected	View Report
Financial Report 08/01/2019 - 09/30/2019	09/23/2019	Approved / Paid	View Report
Financial Report 09/02/2019 - 09/19/2019	09/11/2019	Approved / Awaiting Payment	View Payment Request View Report
Financial Report 09/20/2019 - 10/21/2019	09/20/2019	Pending Approval	View Report

6.3. Reviewing and Approving Submitted Activity Reports

If you have been assigned in the *Edit Solicitation* page as part of the Activity Report approval sequence, the task will appear on your Program Dashboard. From the Grant Management tab, select *Subrecipient Management*.

- 1) If a subrecipient has submitted an Activity Report, it will appear in your Pending Approval Tasks. From the Program Dashboard, find the Activity Report task and select *Visit Program*:

Your Pending Approval Tasks

Program	Project	Org Name	Created Date	Task Type	Action
Workforce Development Program (WDP) Grant - FY 2019	Government Organization Workforce Development Program		07/03/2019	Award Recommendation Approval	Visit Program
Workforce Development Program (WDP) Grant - FY 2019	Job Incubator		07/09/2019	Financial Report Approval	Visit Program
Workforce Development Program (WDP) Grant - FY 2019	Job Incubator		09/16/2019	Financial Report Approval	Visit Program
Workforce Development Program (WDP) Grant - FY 2019	Job Incubator		09/16/2019	Activity Report Approval	Visit Program

- 2) On the following page, under Pending Approval Tasks, find the Activity Report and click on *Review Activity Report*:

Pending Approval Tasks

Project	Org Name	Task Type	Submitted Date	Action
Job Incubator		Activity Report Approval	09/16/2019	Review Activity Report
Job Incubator		Financial Report Approval	09/16/2019	Review Financial Report
Job Incubator		Financial Report Approval	07/09/2019	Review Financial Report

Showing 1 to 3 of 3 entries

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

- 3) Review the Activity Report and approve or reject it:

File Name	File Size	Created On
There are currently no files available.		
Showing 0 to 0 of 0 entries		

Approve
Reject

- 4) For either an approval or rejection, you can leave a note or set of instructions for the subrecipient, then click *Ok*.

NOTE: If you select *Reject*, the subrecipient will have to submit a new *Activity Report* if you do wish for them to make corrections:

Are you sure you want to approve this activity report?

Enter a comment: external

5000 characters remaining.

Ok
Cancel

- 5) The subrecipient will receive an email notification regarding your response.

- 6) The approval response will also be listed in the Subrecipient's Award Dashboard in *Portal* as a Financial Activity. Below is an example view from the subrecipient's *Portal* account:

Financial Activities

Show 10 entries

Financial Report	Reporting Period	Created By	Date Created	Current Status
Financial Report	07/03/2019 -- 07/03/2019	Ulysses Grant	09/16/2019	Pending Approval
Activity Report	09/01/2019 -- 09/30/2019	Ulysses Grant	09/16/2019	Approved

6.4. Tracking Program Income

Program Income information can be tracked and is visible when a budget is present

Add Payment
View/Edit Budget
Award Files
Subrecipient Monitoring





	Spend	Match	Spend + Match	% Match
Total Approved	\$ 720,616.00	\$ 0.00	\$ 720,616.00	0 %
Total Spend	\$ 235,874.95	\$ 0.00	\$ 235,874.95	0 %
Total Remaining	\$ 484,741.05	\$ 0.00	\$ 484,741.05	0 %
Total Disbursement	\$ 235,874.95			
Payment Balance	\$ 0.00			

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

Program income can be viewed on the *Subrecipient Dashboard* and the *Financial Report Approval* screen.

7. Updating the Subrecipient's Report Task Schedule

If you are requesting multiple financial reports at scheduled intervals, these will appear in a subrecipient's Award Detail as Financial Report Requests on specific days. Below is an example view from their *Portal* account:

Pending Tasks		
Show	10	entries
Search: <input type="text"/>		
Task Type	Due Date	Actions
Financial Report Request	09/23/2019	
Financial Report Request	09/30/2019	
Financial Report Request	10/07/2019	
Financial Report Request	10/14/2019	

The frequency or intervals between each Financial Report can be edited at any time.

- 1) In the image below, the subrecipient is required to submit weekly reports. Under Subrecipient Pending Tasks, select *Redefine Financial Report Tasks*:

Subrecipient Pending Tasks		
Redefine Financial Report Tasks		
Show	10	entries
Search: <input type="text"/>		
Task Type	Due Date	Actions
Financial Report Request	09/23/2019	Actions
Financial Report Request	09/30/2019	Actions
Financial Report Request	10/07/2019	Actions

- 2) Provide the outline for the new task requirements. Below is an example of changing the task schedule from weekly to monthly:

Define a frequency for the Financial Report task

Frequency: Monthly

Interval: Every month

On: ☒ A day of the month 1 ☐ The last day of the month

Starting: 09/23/2019

Until: 09/23/2020

Ok Cancel

1. **Frequency:** select if the subrecipient will be submitting a weekly or monthly report.
2. **Interval:** select the number of weeks or months between each report.
3. **On:** select the date on which you wish the task to trigger.
 - If you selected Weekly frequency, select the day of the week the task will be due
 - If you selected Monthly frequency, select the day of the month the task will be due
4. **Starting/Until:** the total duration of the reporting period.


In Grants Network, the task list in *Subrecipient Details* will be updated. The dates will also update in the Award Details for the subrecipient to see in *Portal* as shown below:


Task Type	Due Date	Actions
Financial Report Request	06/30/2020	Actions
Financial Report Request	09/30/2020	Actions
Activity Report Request	09/30/2020	Actions
Financial Report Request	12/31/2020	Actions

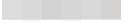
8. Subrecipient Report Builder

The *Subrecipient Report Builder* allows for a multitude of criteria to be selected for your program. Located on the *Program Detail* page, the *Subrecipient Report Builder* displays items available to be included in a report:

Program Detail

 **Program-FY2020** Published

Department: ADA - 

Total Funding: 

Application Period: 01/22/2019 - 07/11/2019

[Subrecipient Report](#)
[Edit Solicitation](#)
[Preview Application](#)
[Ext. Solicitation Listing](#)
[Application Workspace](#)

Award Recommendation Approval


You currently have no pending recommendation approvals. Click the reload button to refresh.


[Reload](#)

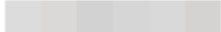
To generate the report:

1. Select the Subrecipient Report button

Program Detail

 **Program-FY20**

Department: ADA - 

Total Funding: 

Application Period: 01/22/2019 - 07/11/

[Subrecipient Report](#)
[Edit Solicitation](#)

Award Recommendation Approval

You currently have no pending recommendation ap

2. Select the data you would like to include in your export report from the following options. Use the **Select ALL** check box to include all in your report:

a. Program Details

Program Details:

☐ Select All

- | | |
|--|--|
| <input checked="" type="checkbox"/> Solicitation Title | <input type="checkbox"/> Public/Private |
| <input type="checkbox"/> Total Program Funding | <input type="checkbox"/> Primary Workspace Email |
| <input type="checkbox"/> Application Start Date | <input type="checkbox"/> Multiple Applications |
| <input type="checkbox"/> Application Close Date | <input type="checkbox"/> Require Budget |
| <input type="checkbox"/> Publish Date | <input type="checkbox"/> Budget Template Name |
| <input type="checkbox"/> Reference URL | <input checked="" type="checkbox"/> Solicitation Unique Identifier |
| <input type="checkbox"/> CFDA | |

b. Award Details

Award Details:

☐ Select All

- | | |
|---|---|
| <input checked="" type="checkbox"/> Organization | <input checked="" type="checkbox"/> EIN |
| <input checked="" type="checkbox"/> Project Title | <input checked="" type="checkbox"/> Award Approval Date |
| <input checked="" type="checkbox"/> Award Unique Identifier | <input checked="" type="checkbox"/> Award/Contract Number |
| <input checked="" type="checkbox"/> PO Number | |

c. Award Financials

Award Financials:

☐ Select All

- | | |
|---|---|
| <input checked="" type="checkbox"/> Total Funding Approved | <input checked="" type="checkbox"/> Total Expended to Date |
| <input checked="" type="checkbox"/> Total Federal Funding | <input checked="" type="checkbox"/> Total Match to Date |
| <input checked="" type="checkbox"/> Total Non-Federal Funding | <input checked="" type="checkbox"/> Total Spend + Match to Date |
| <input checked="" type="checkbox"/> Match Type | <input checked="" type="checkbox"/> % Match to Date |
| <input checked="" type="checkbox"/> Award Match Amount | <input checked="" type="checkbox"/> Total Program Income Received to Date |
| <input checked="" type="checkbox"/> Performance Period Start | <input checked="" type="checkbox"/> Total Program Income Expended to Date |
| <input checked="" type="checkbox"/> Performance Period End | <input checked="" type="checkbox"/> Program Income Balance |

d. Task Details

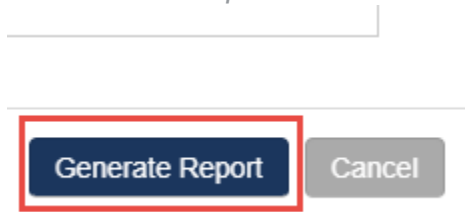
Task Details:

☐ Select All

- | | |
|--|---|
| <input checked="" type="checkbox"/> Financial Report Tasks - Open | <input checked="" type="checkbox"/> Activity Report Tasks - Open |
| <input checked="" type="checkbox"/> Financial Report Tasks - Completed | <input checked="" type="checkbox"/> Activity Report Tasks - Completed |

NOTE: The report must include just one item from the popup before it can be generated

3. Click *Generate Report*

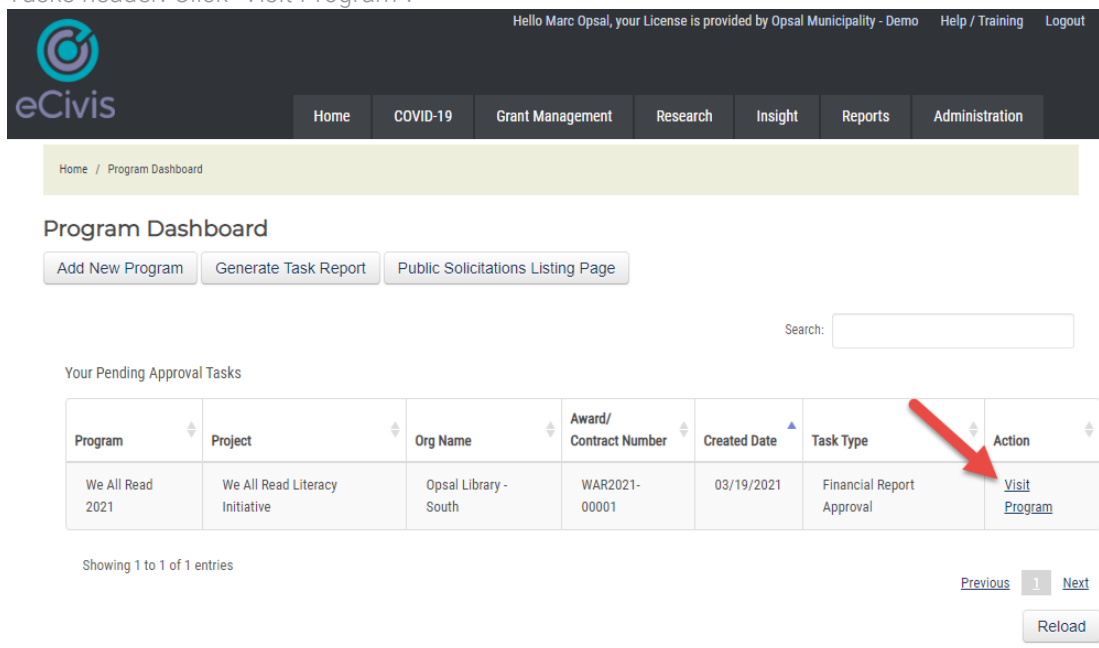


The report will export into an Excel document and will only include awarded subrecipient data.

9. Award Closeout Process

When your subrecipient has submitted their final financial report and is ready to close out their grant, they will initiate the closeout process. At this point, you simply need to approve the final financial report:

1. When your subrecipient initiates the closeout process with their award, and submits their final award, you will go to your Program Dashboard. There, you will see a new task under your Pending Approval Tasks header. Click "Visit Program":



The screenshot shows the eCivis Program Dashboard. At the top, there is a navigation bar with the eCivis logo and a user greeting: "Hello Marc Opsal, your License is provided by Opsal Municipality - Demo". The navigation bar includes links for Home, COVID-19, Grant Management, Research, Insight, Reports, and Administration. Below the navigation bar, there is a breadcrumb trail: "Home / Program Dashboard". The main heading is "Program Dashboard", followed by three buttons: "Add New Program", "Generate Task Report", and "Public Solicitations Listing Page". A search bar is located to the right of these buttons. Below the search bar, the section "Your Pending Approval Tasks" contains a table with the following data:

Program	Project	Org Name	Award/ Contract Number	Created Date	Task Type	Action
We All Read 2021	We All Read Literacy Initiative	Opsal Library - South	WAR2021-00001	03/19/2021	Financial Report Approval	Visit Program

Below the table, it says "Showing 1 to 1 of 1 entries". To the right of the table, there are links for "Previous", "1", and "Next", and a "Reload" button.

2. Beneath the Subrecipient Awards header, click on the Project title. This will take you into the project you so you view the final financial report:

Subrecipient Awards

Organization	Project	Award/ Contract Number	Contract Start	Contract End	Total Award
Opsal Library - South	We All Read Literacy Initiative	WAR2021-00001	03/19/2021	12/31/2021	\$0.00

3. Beneath Pending Approval Tasks, you will see a new Financial Report. Click Actions → Review to view and approve:

Program Detail

We All Read 2021 Published

Department: Community Development

Total Funding: \$2,000,000.00

Application Period: 03/19/2021 - 12/31/2021

[Subrecipient Report](#)
[Add Misc Task](#)
[Edit Solicitation](#)
[Preview Application](#)
[Ext. Solicitation Listing](#)
[Application Workspace](#)
[Budget Report](#)

Award Recommendation Approval

You currently have no pending recommendation approvals. Click the reload button to refresh.

[Reload](#)[Initiate Direct Award](#)

Pending Awards Awaiting Recommendation

There are currently no award recommendations for this solicitation. Click the reload button to refresh.

[Reload](#)Search:

Pending Approval Tasks

Project	Org Name	Award/ Contract Number	Task Type	Performance Period	Submitted Date	Action
We All Read Literacy Initiative	Opsal Library - South	WAR2021-00001	Financial Report Approval	03/19/2021 - 03/31/2021	03/19/2021	Actions <div> Review </div>

4. You will see a red banner that tells you this is a closeout financial report. Review the report and Accept or Return to the Subrecipient. If the report looks acceptable, click "Accept":

Subrecipient Detail

Award Detail

Organization: Opsal Library - South
Project: We All Read Literacy Initiative
Approval Date: 03/19/2021

Approved Amount: \$0.00 [+](#)**Total Federal Award:** \$0.00**Total Other Award:** \$0.00**Total Match:** \$0.00**Performance Period:** 03/19/2021 - 12/31/2021**Program:** We All Read 2021**Award/Contract Number:** WAR2021-00001**Subrecipient Risk:** Low

Note: This is a closeout financial report. During review please ensure that all performance reporting and required tasks have been completed.

5. A pop-up will prompt you to officially certify that the performance and financial reporting has been completed for this subaward and that it is ready to be closed. Click the checkbox, and add any comments you need to.

NOTE: You may select a type of closeout that matches what you believe matches the instance. In most cases "Standard – Compliant" is acceptable:

Are you sure you want to approve this financial report?

This is a closeout financial report. Are you sure this report is ready to be approved? This means that on final approval no other pending reports or tasks can be accessed.

☒ By checking this box and clicking submit I certify to the best of my knowledge that all performance and financial reporting has been completed and this subaward is ready to be closed.

Please select the type of closeout:

Standard - Compliant

Enter a comment: external

Final financial report approved. |

4968 characters remaining.

Enter a comment: internal

5000 characters remaining.

Ok Cancel

- Now the subaward has been closed out. The subrecipient will see the status of their award in Portal change from "Closeout" to "Closed."