



# eCivis

## **RHODE ISLAND SPECIFIC GUIDE**

Grants Network Updates  
for Rhode Island Users

# Contents

Introduction.....	3
<i>Highlights</i> .....	3
<i>Key Takeaways</i> .....	4
<b>Part 1: RI Specific Grantee Pre-Award.....</b>	<b>5</b>
<b>1 Create a Project .....</b>	<b>5</b>
1.1 Define Your Team Members .....	7
<b>2. Locate/Find Grant .....</b>	<b>9</b>
1. Save and Assign Grant.....	9
3.1 Save Your Selected Grant .....	9
3.2 Save & View Your Selected Grant .....	14
2. Budget Construction - Application Preparation Stage .....	15
4.1 Putting your grant into “Application Preparation” .....	15
4.2 Create Your Grant Budget .....	16
4.3 Budget Template Review .....	17
4.4. <i>Create a Budget Table</i> .....	18
4.5 <i>Budget Narrative</i> .....	21
4.6 <i>Budget Documents</i> .....	22
<b>Part 2: RI Specific Grantee Post Award.....</b>	<b>24</b>
<b>1.0 Setting up a Parent Grant (one-to-one relationship) .....</b>	<b>24</b>
1.1 Grant Awarded – Enter a New Award Notification .....	24
1.2 Confirm Final Budget & Allow Transactions to Map from RIFANS to eCivis GMS .....	26
<b>2.0 Setting up a Child Budget for a Subproject .....</b>	<b>28</b>
2.1 Grant Awarded – Setting up a Parent Grant with Child Projects - Subprojects.....	28
<b>3.0 Verify your Umbrella Project and Grant IDs .....</b>	<b>34</b>
<b>4.0 Confirm Final Grant Budget.....</b>	<b>37</b>
4.1 Review Stored Budget (Awarded Stage).....	37
4.2 Review Stored Budget (Post-Award Stage) .....	41
4.3 Uncategorized Transactions .....	44
<b>Appendix A: RI SF-424A All Components.....</b>	<b>47</b>
<b>Appendix B: Data Dictionary: .....</b>	<b>49</b>

## Introduction

Welcome to the Rhode Island User Specific Training Guide for **State as Grantee** Management within eCivis Grants Management System (GMS). This document will help facilitate further adoption of Grants Network by identifying areas where specific Rhode Island data entry and configuration is required. This document provides step-by-step instructions for creating grants and grant budgets in GMS.

## Highlights

- RI has chosen to integrate eCivis with Rhode Island Finance Management system (RIFANS) to ensure grant data is captured at the transaction level; thereby, enabling Rhode Island users with robust grants management, compliance and reporting.
- For data to transfer from eCivis to RIFANS, RI users must set up their grants in eCivis first, for the eCivis system to autogenerate a unique **Rhode Island Grant Identifier (RIGID)**. The RIGID is a unique identifier that ties the GMS to line sequence(s) in RIFANS. The RIGID value populates the **Internal Grant ID** field, in eCivis.
  - The RIGID is created after the Grant is moved to the *Grant Awarded* stage, so there may be a period where you will not see the RIGID.
  - Do NOT enter a value into the **Internal Grant ID** field. Any data entered in the Internal Grant ID field will be overridden when the RIGID is autogenerated.
  - Do enter the 7-digit line sequence assigned by OMB into the **Internal Grant Name** field.
- Grants that are in the stage of “Grant Awarded”, “Implementation”, or “Closeout” will be included in the data transfer.
- Data is transferred on a nightly basis between eCivis and RIFANS.
- RI users **MUST** set up their budgets within eCivis to enable grant related financial transactions to map from RIFANS to eCivis.
- Users should consult the Accounts and Control for specific user guide information for entering transactions in RIFANS directly.
- This User Specific Training Guide relates to the RI process of setting up grants, subprojects, and budgets in two scenarios:
  1. 1 to 1 relationship between grant and tracking financials in RIFANS



2. 1 to many relationships between grant and tracking financials in RIFANs
  - a. If you utilize subproject tracking per the SF-424A found in Appendix A, you must use the “Allocation” feature in eCivis.
3. The eCivis Budget will have two Rhode Island Specific templates to choose from. The “RI Non- Construction” and “RI Construction”
4. Most federal awards use the **RI Non-Construction** budget format, which parallels the SF-424A. Only select **RI Construction** if the federal agency requires the SF-424C form.
5. Each budget template is prepopulated with the most utilized Natural Accounts for tracking Federal expenditures and Match expenditures. RI end users may add additional rows to the budget template with their specific Naturals but must ensure it is in the prescribed format below.
6. The GL Code format may contain three separate sections separated by a dash “-“. It is very important to enter the GL Code exactly as show below, depending on the level of allocation you require.
  - a. Part 1: Account Source: Designation to identify whether the allocation is a Federal expenditure (02)
  - b. “-“
  - c. Part 2: Natural Account
  - d. Note: ALL match transactions will be tracked at the Natural Account level as shown below.
7. Your GL Account will look like the following:
  - a. **Grant transactions: 02-621110**
  - b. **Match transactions: 621110**

### **Key Takeaways**

- Enter, or move, your grant into the *Grant Awarded* stage to enable the eCivis-RIFANs integration
- Set up your budgets to enable RIFANs transactions to map to projects, subprojects and granular ID’s according to how RI users report on the SF-424A Section A
- How to enter naturals/GL code in the grant budget, to accommodate RI specific tracking and allocation requirements



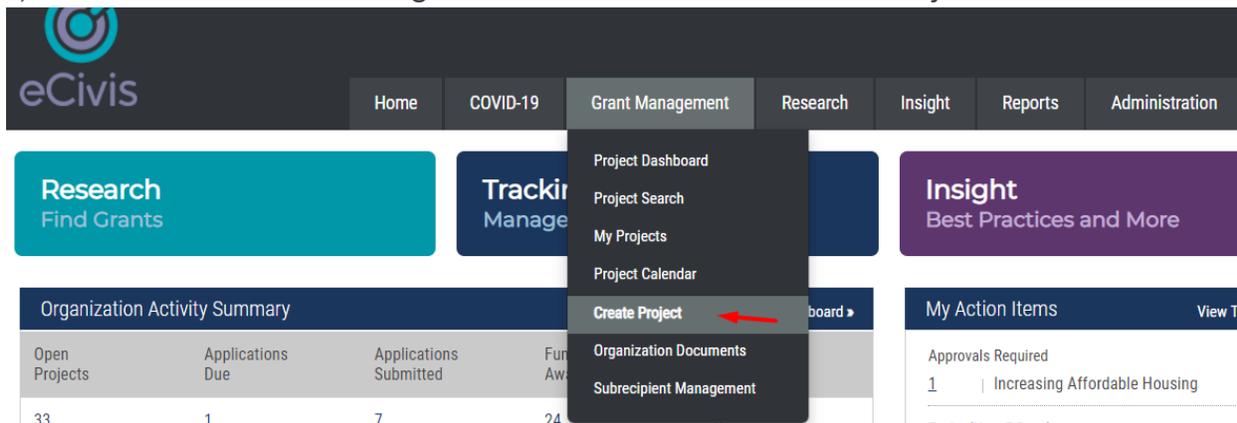
## Part 1: RI Specific Grantee Pre-Award

You can create the project you wish to fund in eCivis before finding and saving grants. This ensures that the grants you find fit your project funding needs, and that you have a central location from which to manage your grant-related task. You can also search for funding and then create a project to assign that grant to, or you can add your own funding (Organizational Funding) and assign that to a new or existing project. Use the Organizational Funding feature for formula (non-competitive) grants.

A unique project was automatically created for each existing award migrated into eCivis in 2021. For new awards, you should establish a separate umbrella Project for each CFDA number. Then associate future awards to Projects by CFDA.

### 1 Create a Project

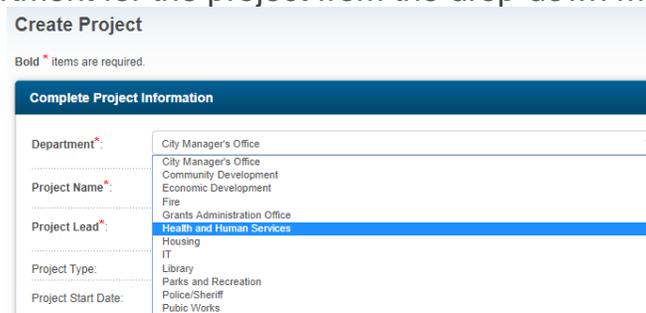
1) Click on the Grant Management Tab and select “Create Project”:



The screenshot shows the eCivis dashboard with the 'Grant Management' tab selected. A dropdown menu is open, showing options: Project Dashboard, Project Search, My Projects, Project Calendar, **Create Project** (indicated by a red arrow), Organization Documents, and Subrecipient Management. Below the menu, there is a table for 'Organization Activity Summary' and a 'My Action Items' section.

Open Projects	Applications Due	Applications Submitted	Funding Awards
33	1	7	24

2) Select the Department for the project from the drop-down menu:



The screenshot shows the 'Create Project' form. The 'Department' dropdown menu is open, showing a list of departments: City Manager's Office, City Manager's Office, Community Development, Economic Development, Fire, Grants Administration Office, **Health and Human Services** (highlighted), Housing, IT, Library, Parks and Recreation, Police/Sheriff, and Public Works.

3) Enter a project name into the “Project Name” field.

4) Select a Project Lead from the drop-down menu:



Project Lead\*:  

Project Type:

- 5) Determine if the project is a Construction or Non-Construction project and select the corresponding radio button. Select Non-Construction if the federal agency requires the SF-424A. Select Construction if the federal agency requires the SF-424C.
  - 6) Add a Project Start Date and a Project End Date. These fields are required.
  - 7) Add a brief Project Summary. This field is required and can be modified later.
  - 8) Click "Save."
- Create Project

**Bold \*** items are required.

Complete Project Information

Department\*:  

Project Name\*:

Project Lead\*:  

Project Type:  Non-Construction  Construction

Project Start Date:  

Project End Date:  

Internal Project ID:

Internal Project Name:

Project Summary\*:



- 9) You will be taken to your newly created Project Dashboard:



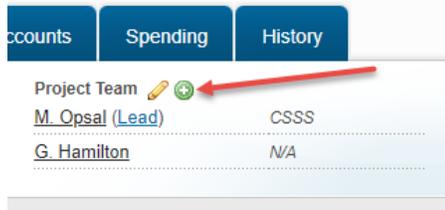


## 1.1 Define Your Team Members

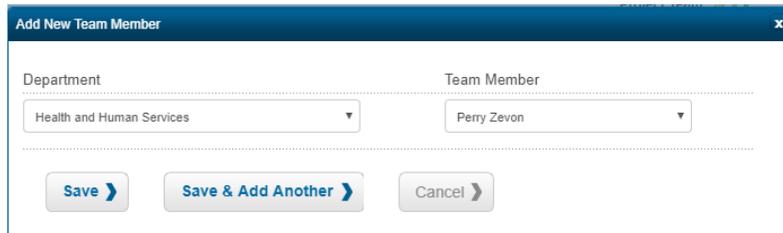
When you create a new project, the creator of the project and the assigned Project Lead will be listed as project team members. You are required to add a member of your Fiscal team to your project.

### 1.1.1 Add Project Team Members

- 1) Click on the green plus sign icon beside “Project Team”:



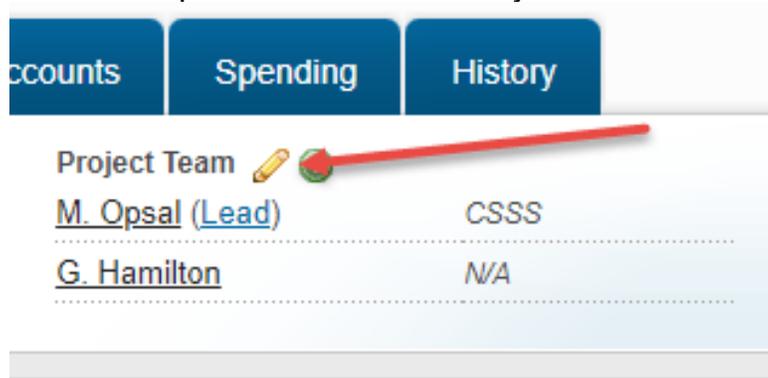
- 2) A pop-up will appear that asks you to select the Department where the new project Team Member works, and the specific Team Member (once the Department is selected). After you select the Department and Team Member, you can click “Save” to add the selected Team Member, or click “Save & Add Another” to add more Team Members to the project:



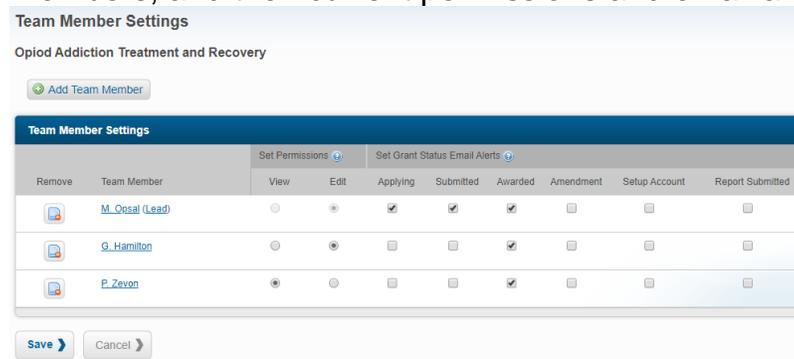
### 1.1.2 Manage Team Member Settings



3) Click on the pencil icon beside “Project Team”



4) You will be taken to a new page that lists all of the current project team members, and their current permissions and email alert settings:



5) The “Set Permissions” section provides two options for your project (View and Edit)

- View: A specific project team member can only see project and grant information, but not make changes.
- Edit: A specific team member can make changes to project settings, and grant information. All Team Leads will have “Edit” access by default.

6) The “Set Grant Status Email Alerts” section allows you to control the types of emails your project team members will receive.

- **Applying:** Team Member will receive an email notification when a grant is in the “Application Preparation” stage within the project.
- **Submitted:** Team Member will receive an email notification when a grant is in the “Application Submitted” stage within the project.
- **Awarded:** Team Member will receive an email notification when a grant is in the “Funds Awarded” stage within the project.



- **Amendment:** Team Member will receive an email notification if there is an amendment to a grant within a project (e.g.: the grantor awards additional funds on top of the original award amount).
- **Setup Account:** Team member will receive an email whenever an approval request is sent to the budget team to approve awarded funds.
- **Report Submitted:** Team member will receive an email whenever any scheduled report task is marked as “Done.”

7) After you have set up your project team permissions, email alerts, and added any additional team members you wish, click “Save.”

## 2. Locate/Find Grant

Locate the grant you want to save to the project - search for your grant through the Grant Research Tool or locate the grant through your Organizational Funding. Each federal grant has a unique Federal Assistance Identification Number (FAIN). Only create (or save) 1 grant per FAIN in eCivis.

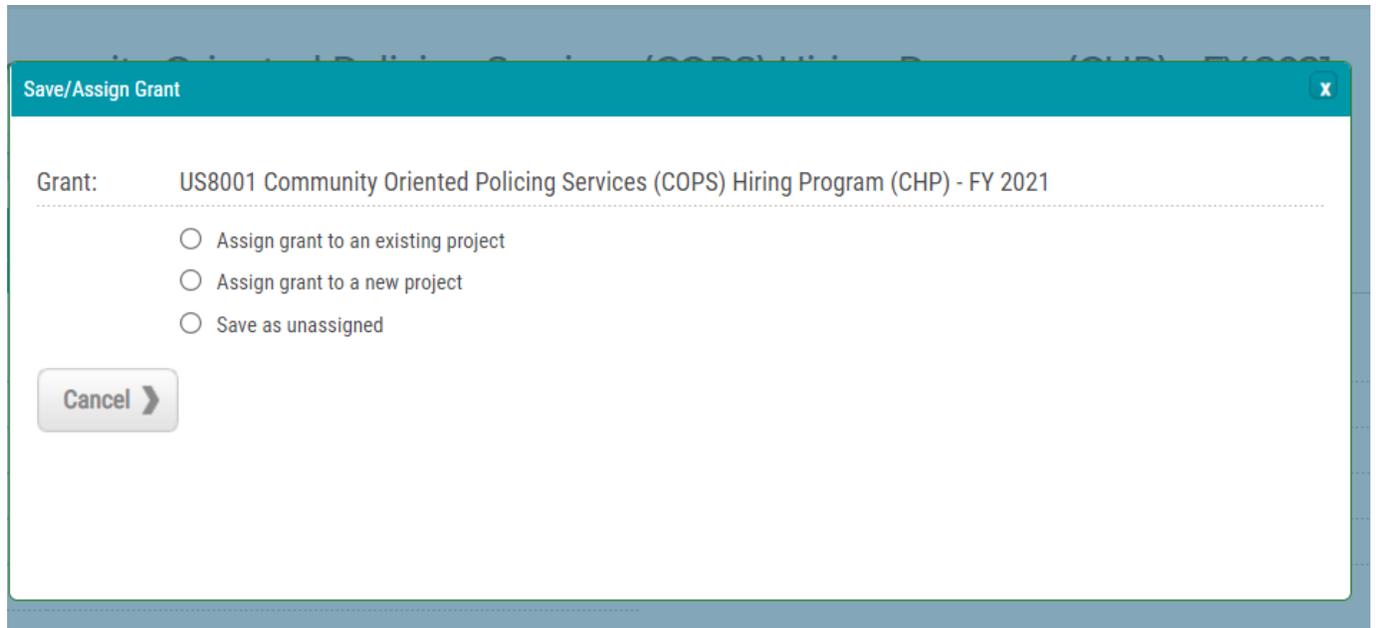
### 1. Save and Assign Grant

#### 3.1 Save Your Selected Grant

Click this button to save a grant you are viewing to a project. This will let you manage the grant from initial application through all stages of the Grant Lifecycle. When you click “Save / Assign” a pop-up will appear:

- 1) Select whether you want to assign a grant to an existing project (recommended) or if you want to create a new project and assign the grant to that new project.

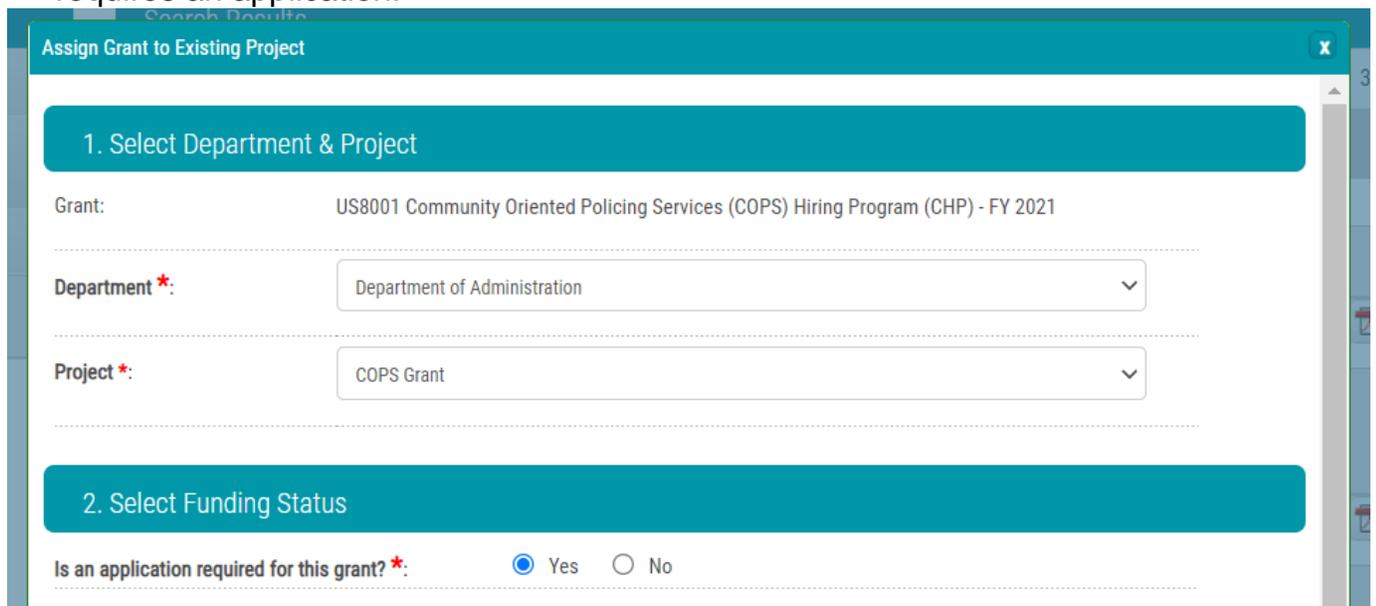




The screenshot shows a dialog box titled "Save/Assign Grant" with a close button (X) in the top right corner. The main content area displays the following information:

- Grant: US8001 Community Oriented Policing Services (COPS) Hiring Program (CHP) - FY 2021
- Three radio button options:
  - Assign grant to an existing project
  - Assign grant to a new project
  - Save as unassigned
- A "Cancel" button with a right-pointing arrow.

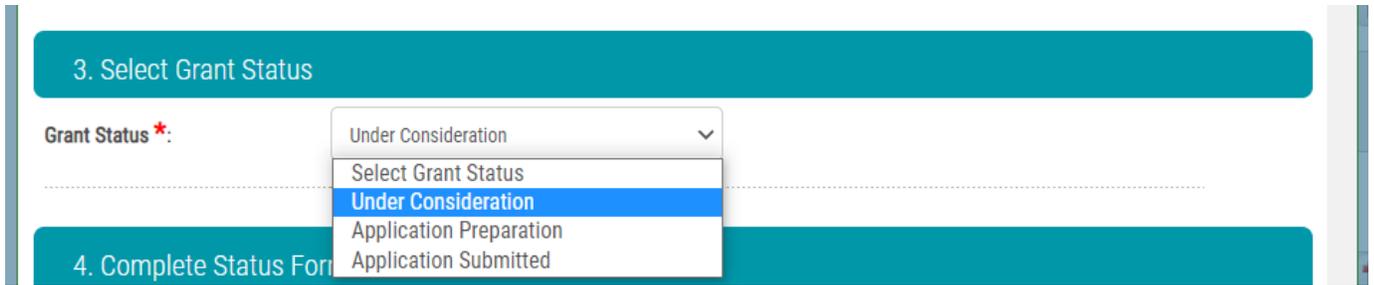
- 2) If you click “Assign grant to an existing project,” select the Department and Project to which you wish to save the grant, and answer whether the grant requires an application:



The screenshot shows a dialog box titled "Assign Grant to Existing Project" with a close button (X) in the top right corner. The main content area is divided into two sections:

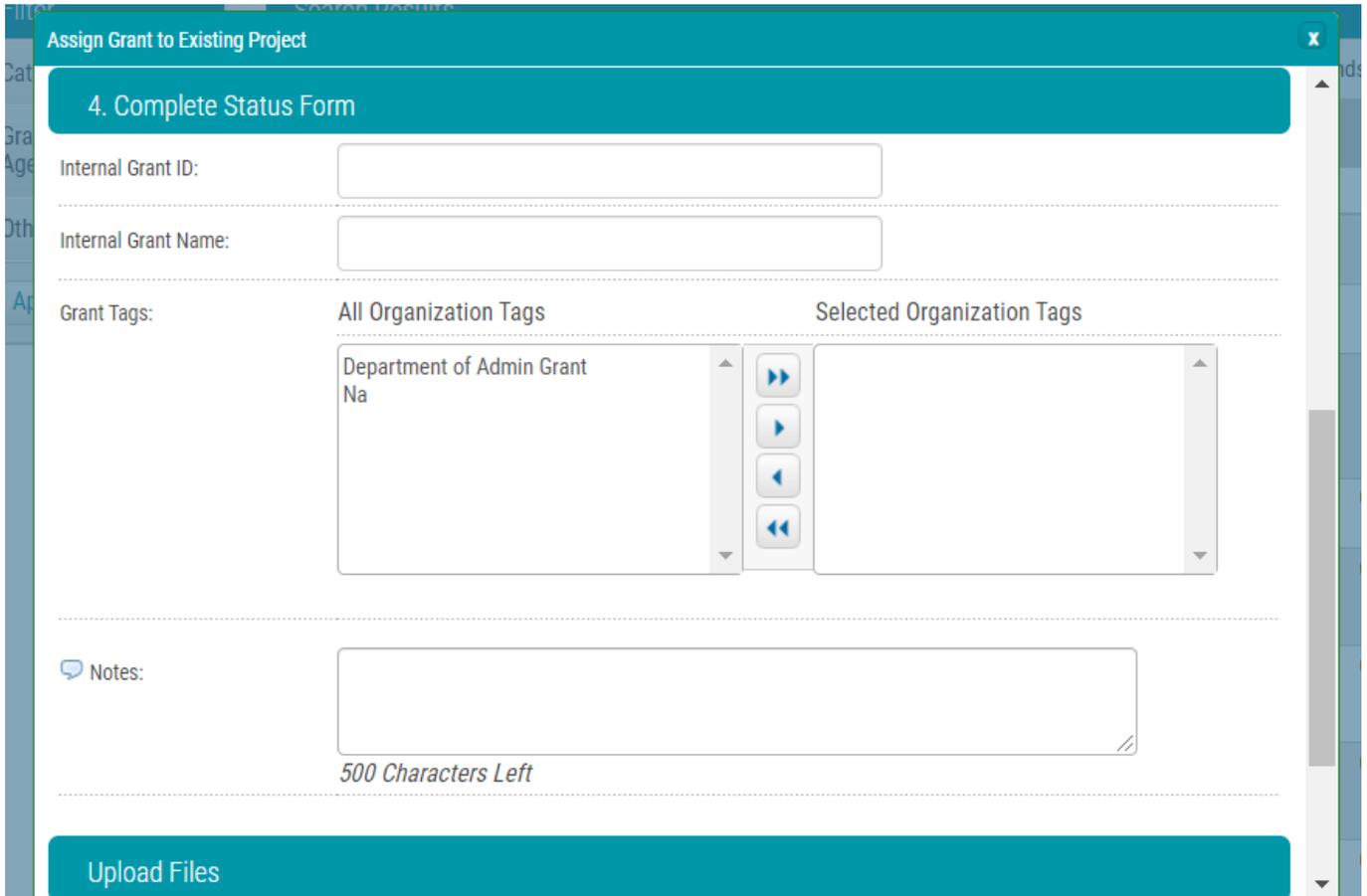
- 1. Select Department & Project**
  - Grant: US8001 Community Oriented Policing Services (COPS) Hiring Program (CHP) - FY 2021
  - Department \*: Department of Administration (dropdown menu)
  - Project \*: COPS Grant (dropdown menu)
- 2. Select Funding Status**
  - Is an application required for this grant? \*:  Yes  No

- 3) This will open a new field where you must select the grant status. When you make this selection, new fields will appear.



Different fields will appear depending on if you select “Under Consideration,” “Application Preparation,” or “Application Submitted.” At all stages selecting a Grant Tag(s) is Required.

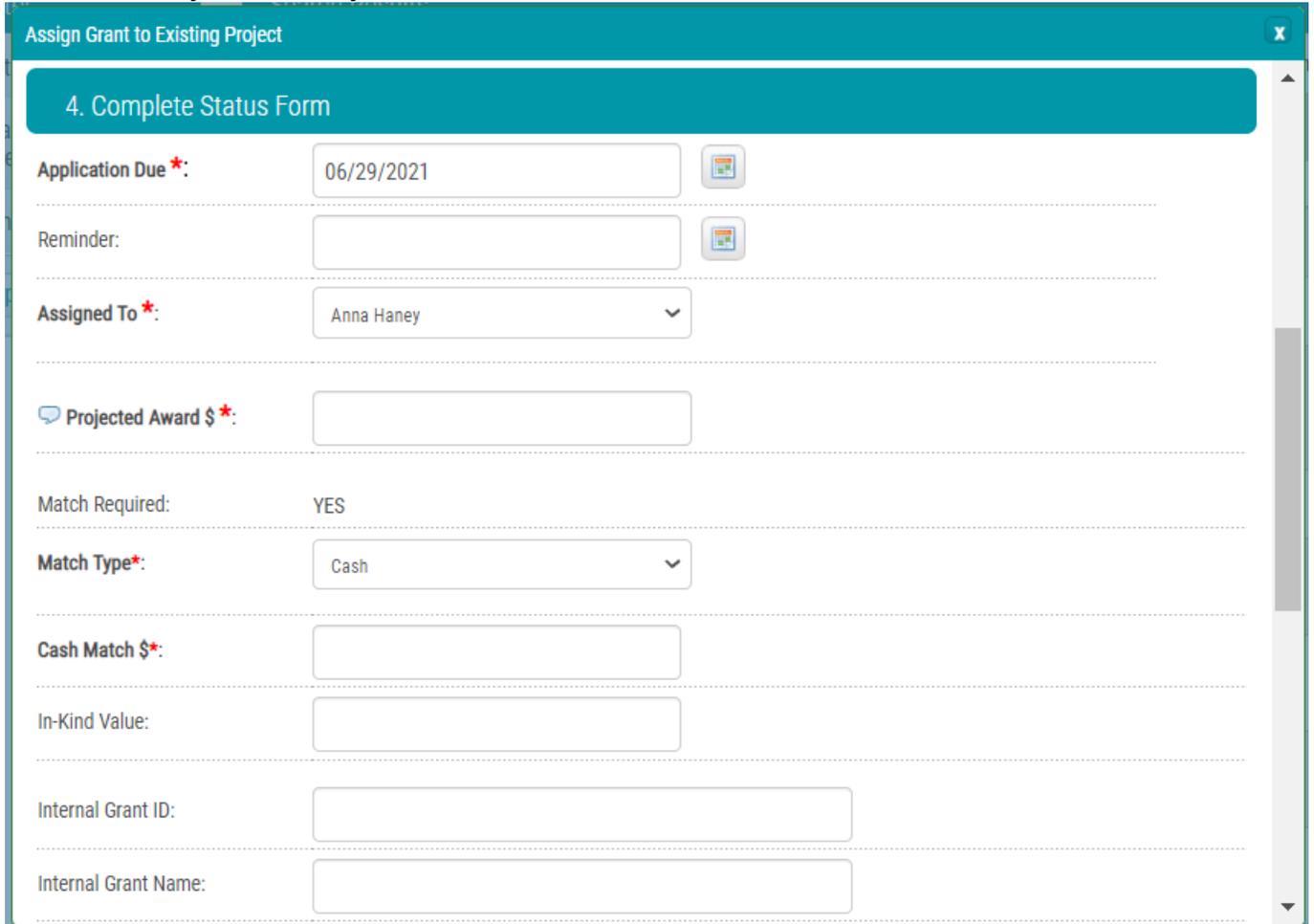
- **Under Consideration:** It is required to select an appropriate Grant Tag(s). If one is not available, select the Grant Tag titled “N/A – no grant tags applicable”. Finally, add any notes and attach any applicable files.



- **Application Preparation:** Because this status indicates that you are further along in the application, more information is required. You will need to enter an application due date, can enter a reminder, assign a project member, add



a projected award amount, add the required Grant Tag(s) as noted above or the “N/A – no grant tags available” option, any notes, and upload any files. When you’re ready to continue, click “Save.”



Assign Grant to Existing Project

#### 4. Complete Status Form

Application Due \*: 06/29/2021

Reminder:

Assigned To \*: Anna Haney

Projected Award \$\*:

Match Required: YES

Match Type\*: Cash

Cash Match \$\*:

In-Kind Value:

Internal Grant ID:

Internal Grant Name:

- **Application Submitted:** Like Application Preparation, you will need to fill out additional information about the work you have already completed with the application. This includes the application submitted date, who completed the application, the projected award, and match details. You will need to select Grant Tag(s) (required) as noted above or the “N/A – no grant tags available” option and add any notes as well as upload any files. When you’re ready to continue, click “Save.”



Assign Grant to Existing Project X

4. Complete Status Form

App Submitted \*:  

---

Completed By \*:  ▼

---

Projected Award \$ \*:

---

Match Required: YES

---

Match Type\*:  ▼

---

Cash Match \$\*:

---

In-Kind Value:

---

Internal Grant ID:

---

Internal Grant Name:

---

Grant Tags: All Organization Tags Selected Organization Tags

▶▶ ▶

**Internal Grant ID:**

The **Internal Grant ID** is a system generated field. The value that is generated is called the RIGID (Rhode Island Grant Identifier). This value allows the GMS to integrate with your financial system RIFANS. You should NOT enter a value into this field. When you enter a Grant, and it is awarded, the RIGID will be autogenerated on a nightly basis. Prior to the award stage, you will not see a value in this field. If you do enter a value into this field, it will be overwritten by the nightly process.

**Internal Grant Name:**

For newly saved grants going forward, you will need to enter the single 7-digit line sequence into this field. **If you have more than one line sequence number, you may add them to this field dash separated. Example: 1234567-5678912-1245789**

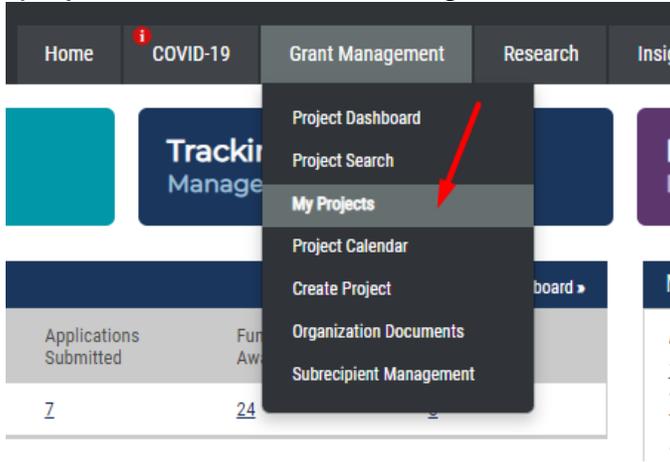
Please follow applicable RI OMB policies and procedures to obtain the line sequence if you do not have it when saving/assigning the grant. You will need to come back and update the grant with this information. Your agency may not initiate any grant-funded transactions until the line sequence assigned by OMB is entered into the **Internal Grant Name** field.



For migrated data, if you see a “0” in this field, please overwrite with the correct 7-digit line sequence(s), separated by a dash. Enter the applicable line sequence(s) at the level you are budgeting, either parent grant or child subproject.

### 3.2 Save & View Your Selected Grant

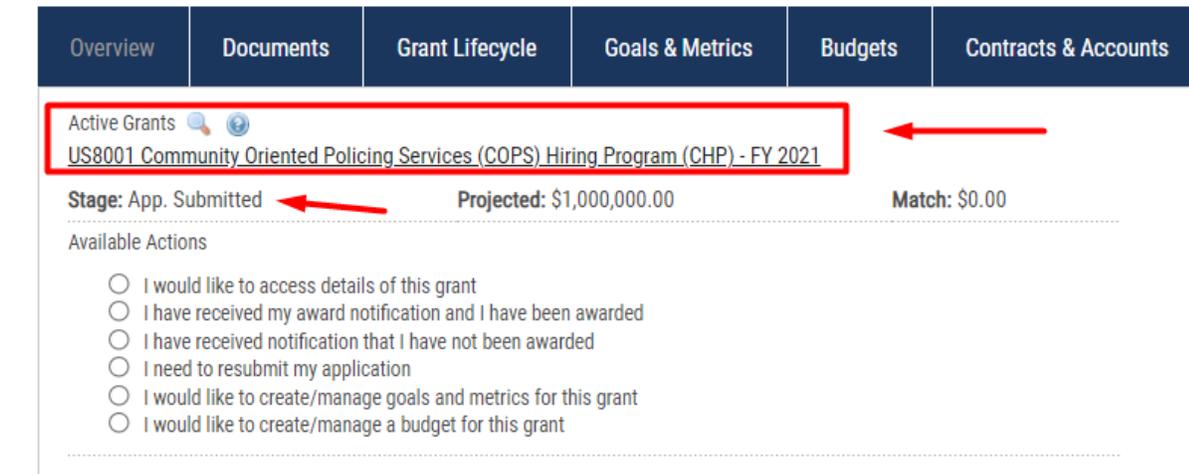
After you click “Save,” the grant will be saved to your project. If you wish to view the grant in your project, click the Grant Management Tab and select “My Projects.”



Then, locate your project by name, and click into it. There, you will see the grant saved in your project. From the Project Dashboard, you will see all the available actions for managing your newly saved grant:

### Project Dashboard: COPS Grant

Department: Department of Administration



A screenshot of the Project Dashboard for a COPS Grant. The dashboard has a navigation bar with tabs: Overview, Documents, Grant Lifecycle, Goals & Metrics, Budgets, and Contracts & Accounts. The 'Active Grants' section is highlighted with a red box and a red arrow. Below this, the grant name 'US8001 Community Oriented Policing Services (COPS) Hiring Program (CHP) - FY 2021' is displayed. The 'Stage' is 'App. Submitted', 'Projected' is '\$1,000,000.00', and 'Match' is '\$0.00'. Below the grant information, there is a section for 'Available Actions' with several radio button options.

Overview	Documents	Grant Lifecycle	Goals & Metrics	Budgets	Contracts & Accounts
Active Grants					
US8001 Community Oriented Policing Services (COPS) Hiring Program (CHP) - FY 2021					
Stage: App. Submitted		Projected: \$1,000,000.00		Match: \$0.00	
Available Actions					
<input type="radio"/> I would like to access details of this grant <input type="radio"/> I have received my award notification and I have been awarded <input type="radio"/> I have received notification that I have not been awarded <input type="radio"/> I need to resubmit my application <input type="radio"/> I would like to create/manage goals and metrics for this grant <input type="radio"/> I would like to create/manage a budget for this grant					

NOTE: The Available Actions (radio buttons) will be different depending on the stage of the grant that you selected when you saved the grant (UnderConsideration, Application Preparation, Application Submitted).

## 2. Budget Construction - Application Preparation Stage

### 4.1 Putting your grant into “Application Preparation”

- 1) Select the grant for which you wish to create a budget in your Project Dashboard, and select “I will apply for this grant”:

Project Dashboard: Opiod Addiction Treatment and Recovery  
Department: Health and Human Services

Overview Documents Grant Lifecycle Goals & Metrics

Active Grants

[US15913 Comprehensive Opioid Recovery Centers \(CORC\) - FY 2020](#)  
Stage: Under Consideration Application Due Date: 03/17/2020

[US16317 Tribal Opioid Response \(TOR\) Grants - FY 2019](#)  
Stage: App. Submitted Projected: \$350,000.00

[US16819 Rural Health Opioid Program - FY 2017](#)  
Stage: Under Consideration Application Due Date: 07/21/2017

Available Actions

- I would like to access details of this grant
- I will apply for this grant
- I am ready to submit my application
- I will not apply for this grant
- I would like to create/manage goals and metrics for this grant
- I would like to create/manage a budget for this grant

NOTE: If “I will apply for this grant” is not an available option, you may have an outstanding Application Approval Task that must be completed. If this is the case, have the appropriate party complete the task. This will make “I will apply for this grant” appear in your grant actions.

- 1) Fill out the required fields, and any others that you wish, on the Grant Status Application Preparation page. When you are finished, click “Save”:

Grant Status - Application Preparation  
Opiod Addiction Treatment and Recovery

Complete Status Form

Grant: US16819 Rural Health Opioid Program - FY 2017

Application Due \*: 07/31/2020

Reminder: 07/01/2020

Assigned To \*: Marc Opsal

Projected Award \$ \*: 200,000.00

Match Required \*: NO

Match Type: N/A

Cash Match \$:

In-Kind Value:

Grant Tags:

All Organization Tags: EPA, Law Enforcement

Selected Organization Tags: Inland Empire-Based Opioid Prevention



2) Your grant is now in the Application Preparation stage:

US16819 Rural Health Opioid Program - FY 2017

**Stage: App. Preparation**                      **Projected: \$200,000.00**

Available Actions

- I would like to access details of this grant
- I am ready to submit my application
- I will not apply for this grant
- I would like to create/manage goals and metrics for this grant
- I would like to create/manage a budget for this grant

## 4.2 Create Your Grant Budget

1) Expand the grant for which you wish to create a budget, and click the “I would like to create/manage a budget for this grant” action:

US16819 Rural Health Opioid Program - FY 2017

**Stage: App. Preparation**                      **Projected: \$200,000.00**

Available Actions

- I would like to access details of this grant
- I am ready to submit my application
- I will not apply for this grant
- I would like to create/manage goals and metrics for this grant
- I would like to create/manage a budget for this grant

2) Select the budget template you wish to use to create your budget either **RI Construction** or **RI Non-Construction**:

Most federal awards use the **RI Non-Construction** budget format, which parallels the SF-424A. Only select **RI Construction** if the federal agency requires the SF-424C form.

Budget Creation Wizard x

ORG0509 eCivis Demo Fund

Instructions: Select from the options below to generate a budget.

Budget Template: \*

RI Construction

**RI Construction**

RI Non Construction

SF-424A Non-Construction

SF-424C Construction

Uniform Guidance Help x

As you develop your application use our digital reference tools to [search the Uniform Guidance](#)



- 3) Click “Save & Close” when you have selected the Budget Template you wish to use.
- 4) You will be taken to a screen that displays your new budget template.

### 4.3 Budget Template Review

You are required to create your budget in the Pre-Award Stage.

Pre-Award Budget for

ORG0508 eCivis Demo Fund

Inception Date: 10/13/2021

[Revision Report](#)

Uniform Guidance Help ✕

As you develop your application use our digital reference tools to [search the Uniform Guidance](#)

---

**Budget Settings**

Indirect Costs: Not Applicable 0.00 %

Match / Cost Share: Not Applir 0.00 % \$ 0.00

Budget Stage: Pre-Award

Actions: ✕ 🔒 🗑️

Discard Changes

**Budget Summary**

\$0.00 Total Direct Costs

\$0.00 Total Indirect Costs

\$0.00 Total Amount (Direct + Indirect)

---

\$0.00 Match / Cost Share

\$0.00 Program Income

NOTE: Greyed out fields are auto populated based on budget information and cannot be edited.

- 1) **Revision Report:** Automatically generates an Excel spreadsheet that shows budget revision data such as a history of revisions, who performed each saved revision, and any notes added by team members.
- 2) **Indirect Costs:** Select the type of indirect cost calculation you want to use in the budget from the drop-down menu:

Indirect Costs: Not Applicable

ch / Cost Share: De Minimus Rate

Negotiated Rate

Itemized

Not Applicable

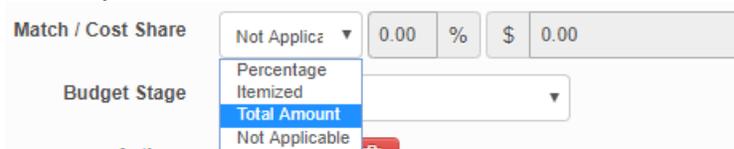
NOTE: If you select “De Minimus Rate,” the indirect cost percentage will become 10%. If you select “Negotiated,” the percentage cost field will become editable:

Indirect Costs: Negotiated Rate 17.00 %

- 3) **Match / Cost Share:** Select the Match / Cost Share required by the grant with this



drop-down menu:

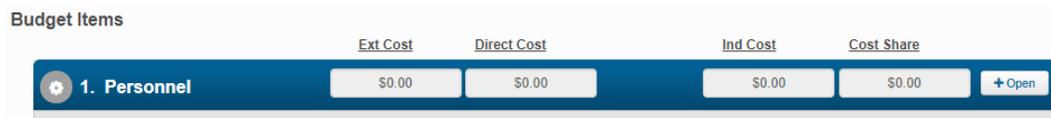


- 4) **Budget Stage:** If you are in the Pre-Award stage and the grant is in the “Application Preparation” stage, the only available option here will be “Pre-Award.”
- 5) **Save:** Save any revisions you made to the budget.
- 6) **Discard Changes:** Close and do *not* save revisions made to the budget.
- 7) **Delete Report:** Delete the entire report. This cannot be undone.

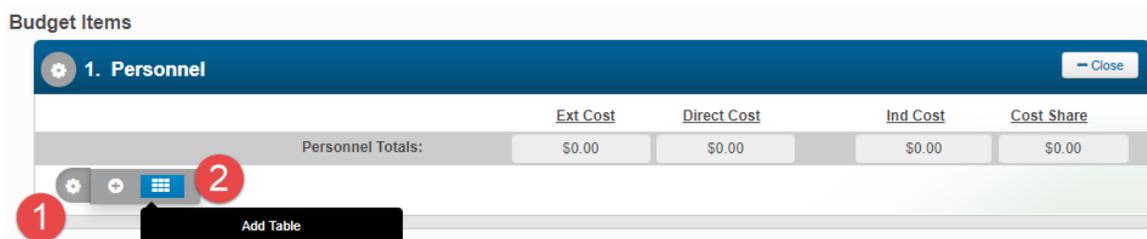
#### 4.4. Create a Budget Table

The Budget Items section is where you will enter costs for all expenses to the selected grant. The RI Budget Templates are pre-populated with the most utilized Naturals Account numbers in each row. Federal expenditures are tracked at the line item detailed by Account Source – Naturals, in the GL Code column (02-61100). Match Expenditures are tracked at the line item detailed only with the Naturals in the GL Code column (61100). If you need to track different Naturals, you may delete a row and add a new row with the information needed and following the instructions below.

- 1) Click “+Open” in the table where you wish to add costs. This will expand the table view.



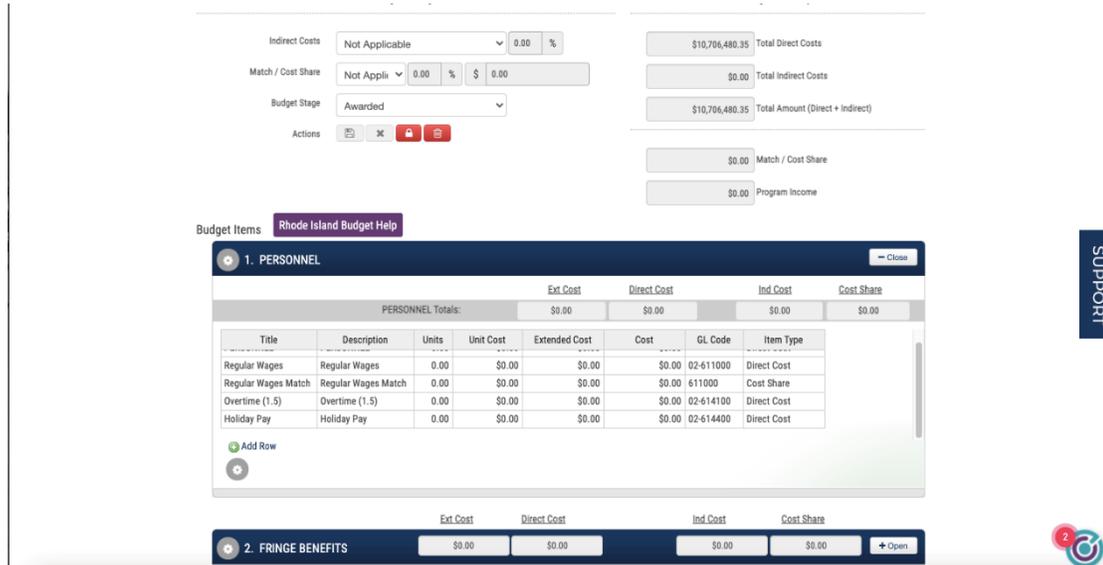
- 2) Click the gray gear icon on the lower left corner of the expanded view, then click the table icon:



- 3) Fill out the appropriate cells with the necessary information as indicated below. It is



imperative the budget is set up correctly to ensure seamless transfer of data between eCivis and RIFANs.



The screenshot displays a budget management interface. At the top, there are summary statistics: Indirect Costs (Not Applicable, 0.00%), Match / Cost Share (Not Applicable, 0.00%), Budget Stage (Awarded), Total Direct Costs (\$10,706,480.35), Total Indirect Costs (\$0.00), Total Amount (Direct + Indirect) (\$10,706,480.35), Match / Cost Share (\$0.00), and Program Income (\$0.00). Below this is a 'Budget Items' section with a 'Rhode Island Budget Help' link. The first item is '1. PERSONNEL', which is expanded to show a table of personnel costs. The table has columns for Title, Description, Units, Unit Cost, Extended Cost, Cost, GL Code, and Item Type. The data rows are: Regular Wages (Regular Wages, 0.00, \$0.00, \$0.00, \$0.00, 02-611000, Direct Cost), Regular Wages Match (Regular Wages Match, 0.00, \$0.00, \$0.00, \$0.00, 611000, Cost Share), Overtime (1.5) (Overtime (1.5), 0.00, \$0.00, \$0.00, \$0.00, 02-614100, Direct Cost), and Holiday Pay (Holiday Pay, 0.00, \$0.00, \$0.00, \$0.00, 02-614400, Direct Cost). Below the table are summary statistics for Personnel: Ext Cost (\$0.00), Direct Cost (\$0.00), Ind Cost (\$0.00), and Cost Share (\$0.00). The second item is '2. FRINGE BENEFITS', which is collapsed and shows summary statistics: Ext Cost (\$0.00), Direct Cost (\$0.00), Ind Cost (\$0.00), and Cost Share (\$0.00). A 'SUPPORT' button is visible on the right side of the interface.

- Title: Natural Title
- Description: Natural Description
- GL Code:
  - For Federal Expenditure line items:
    - Account Source- Natural Account (XX-YYYYYY)
      - Example: 02-611000
    - Account Source Identifier for Federal Expenditures is “02”
  - For Match line items:
    - Natural Account **only** (611000)

Notes:

- This is a critical field used to associate the line item with multiple data sets concatenated into a prescribed format
- This field and data work in conjunction with the RIGID defined above, to map future transactions to the correct budget line item, in the correct grant-project. It **MUST** be entered in the exact format with precise text for transactions to link to the correct line item when they are exported from RIFANs and imported into GN

4) If you are unsure if an expense qualifies as an indirect cost, click on the “search the Uniform Guidance” link within the yellow box in the upper right corner of the budget:

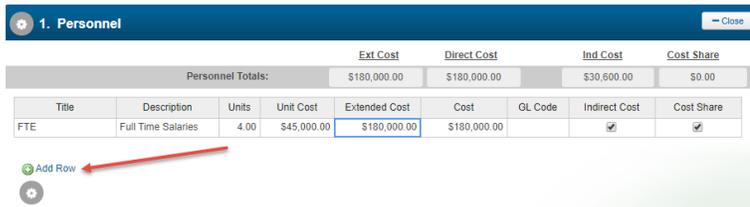


The screenshot shows a 'Pre-Award Budget for' page for the 'US16819 Rural Health Opioid Program - FY 2017'. At the bottom, there are buttons for 'Goals', 'Metrics', and 'Revision Report'. A yellow callout box in the upper right corner contains the text 'Uniform Guidance Help' and 'As you develop your application use our digital reference tools to search the Uniform Guidance'. A red arrow points to the 'search the Uniform Guidance' link within the callout box.



This link will open a modal where you can search for cost item types, and determine if they qualify as indirect costs.

- 5) Cost Share should be checked if this is a match line item. Enter only the natural in the GL Code field for each match line item. Any transactions with a non-federal Account Source in RIFANS will be mapped to your match line items by RIGID and natural.
- 6) Click “Close” when you are finished with the Uniform Guidance Help screen.
- 7) If you wish to add more items to a specific budget category, click the “Add Row” link:



Personnel Totals:				Ext Cost	Direct Cost	Ind Cost	Cost Share	
				\$180,000.00	\$180,000.00	\$30,600.00	\$0.00	
Title	Description	Units	Unit Cost	Extended Cost	Cost	OL Code	Indirect Cost	Cost Share
FTE	Full Time Salaries	4.00	\$45,000.00	\$180,000.00	\$180,000.00		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

[Add Row](#)



## 4.5 Budget Narrative

Use the budget narrative section of your budget to explain the expenses in the above budget items section. This can be exported to distribution outside of Grants Network.

- 1) Click “+Open” on the Budget Narrative bar. This will expand the editable field view.
- 2) Enter your budget narrative by copying/pasting from another document into the body of the budget narrative field, or enter text by typing directly into the field:

Budget Narrative

**Budget Narrative**

Enter your budget narrative below.

<> H1 H2 H3 B I U ☰ ☷ ☹ ☺ 🔗

THE HEALTH COALITION  
Reducing Environmental Health Risks Project  
January 1, 2011 to December 31, 2011

The Health Coalition request to the ABC Foundation is \$120,000 for the period January 1 – December 31, 2011. The total budget for the Reducing Environmental Risks Project is \$231,186. If awarded, ABC Foundation funds will be matched by a \$75,000 grant from the Community Health Foundation (in-hand), and \$36,186 organizational cost share supported by the Health Coalition annual operating budget.

PROJECT PERSONNEL++

Executive Director (10% FTE) will review all protocols, monitor project timeline and activities, and oversee budget expenditures and reporting. She will supervise the Project Director and Research Director, and ensure integration of proposed activities into the continuum of services provided by the Health Coalition. The Health Coalition will contribute all costs associated with the Executive Director's work on the project.

Project Director (30% FTE) will train and supervise Community Organizers, oversee community asset mapping activities, and ensure accuracy of GIS data and maps. The Health Coalition will support a portion of the Project Director's time devoted to the project.

- 3) Utilize the formatting bar above the budget narrative field to format your text:

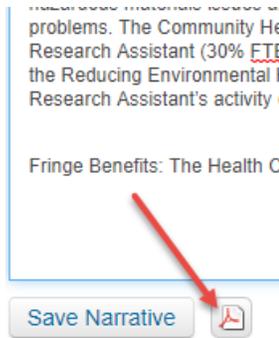
<> H1 H2 H3 B I U ☰ ☷ ☹ ☺ 🔗

THE HEALTH COALITION  
Reducing Environmental Health Risks Project  
January 1, 2011 to December 31, 2011

The Health Coalition request to the ABC Foundation is \$120,000 for the period Janua  
The total budget for the Reducing Environmental Risks Project is \$231,186. If award  
will be matched by a \$75,000 grant from the Community Health Foundation (in-hand)  
organizational cost share supported by the Health Coalition annual operating budget.

- 4) When you have entered your budget narrative, click “Save” to save the narrative. Or, you can click the PDF icon to export a PDF copy of your budget narrative:

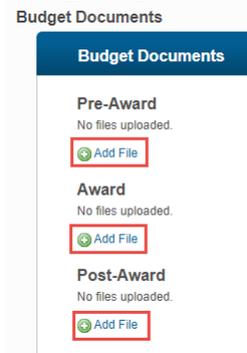




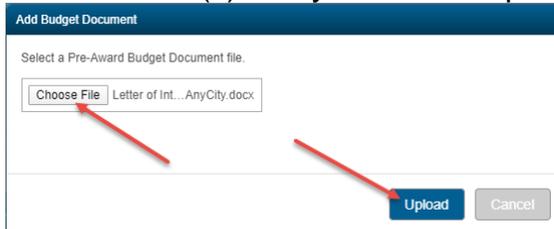
## 4.6 Budget Documents

Upload and store unlimited budget documents in your Grants Network account.

- 1) Click “+Open” on the Budget Documents bar. This will expose all your document upload options.
- 2) Upload documents for Pre-Award, Award, and/or Post-Award stages of your budget by clicking their respective “Add File” links:



- 3) After you click “Add File,” click “Choose File” in the box that appears and select the file(s) that you wish to upload. Click “Upload” to finish:



- 4) The Budget Documents section will list the file(s) that you uploaded, along with the file size, date of upload, team member name who uploaded it, and the ability to delete the file (red trash can icon):



### Pre-Award

Filename	Size	Uploaded	Uploaded By	Actions
 <a href="#">Letter of Intent AnyCity</a>	11.1 Kb	01/30/2020	M. Opsal	



## Part 2: RI Specific Grantee Post Award

### 1.0 Setting up a Parent Grant (one-to-one relationship)

A one-to-one relationship means you do not utilize the “Grant Program Function or Activity” Section A in the SF-424A.

### 1.1 Grant Awarded – Enter a New Award Notification

If you have been awarded grant funds, you will enter this in the Available Actions section of your grant in your project. This process will differ based on the stage of your grant during the time of funds being awarded.

US16317 Tribal Opioid Response (TOR) Grants - FY 2021

Stage: App. Submitted

Projected: \$500,000.00

Match: \$0.00

Available Actions

- I would like to access details of this grant
- I have received my award notification and I have been awarded
- I have received notification that I have not been awarded
- I need to resubmit my application
- I would like to create/manage goals and metrics for this grant
- I would like to create/manage a budget for this grant

To complete the process of moving this grant to the “Grant Awarded” stage:

- 1) Select ***I have received my award notification and I have been awarded*** – this takes you to the Grant Status – Grant Awarded Page
  - Fill out the required and necessary information for your notice – make sure you fill out the fields with the red asterisk as they are required
  - You will need to enter the RIFANS line sequence into the **Internal Grant Name** field. If you have more than one line sequence number, you can enter all of them dash separated. Example: 1234567-4567891- XXXXXXX
  - Please follow applicable RI OMB policies and procedures to obtain the line sequence if you do not have it when saving/assigning the grant. You will need to come back and update the grant with this information. Your agency may not initiate any grant-funded transactions until the line sequence assigned by OMB is entered into the **Internal Grant Name** field.
  - You will need to enter the FAIN in the **Grantor Contract Number** field.



### Complete Status Form

Grant: ORG0025 Promotion of the Arts\_Partnership Agreements\_61-19

Internal Grant ID:

Internal Grant Name:

Projected Award \$\*:

Do you consider this a competitive grant?\*:  Yes  No

Award Notification\*:

Awarded \$\*:

Match Required\*: Yes

Match Type\*:

Cash Match \$\*:

In-Kind Value:

Contract Start Date:

Contract Close Date:

Reminder:

Award Type:  Advance Payment  Reimbursement

DUNS Number:

Grantor Contract Number:

Grant Tags:

All Organization Tags	Selected Organization Tags
<div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;">           COVID Award - Tydings            NA no tags applicable            Tydings Period         </div>	<div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;">           COVID Award         </div>

[Click here to MOVE THIS option](#)

Notes:

500 Characters Left

---

### Allocation Option

Are awarded funds to be available for use as pass-through funding?\*  No  Yes

Are awarded funds to be available for Allocation to sub-projects?\*  No  Yes



**Grant Status - Grant Awarded**  
Opioid Addiction Treatment and Recovery

**Complete Status Form**

Grant: US16317 Tribal Opioid Response (TOR) Grants - FY 2019

Internal Grant ID:

Internal Grant Name:

Do you consider this a competitive grant?  Yes  No

Award Notification\*:

Awarded \$\*:

Match Required\*: NO

Match Type:

Cash Match \$:

In-Kind Value:

Contract Start Date:

Contract Close Date:

Reminder:

Award Type:  Advance Payment  Reimbursement

DUNS Number:

2) Upload any files necessary by clicking the folder button, and click “Save”:

**Upload Files**

Attach Files:  

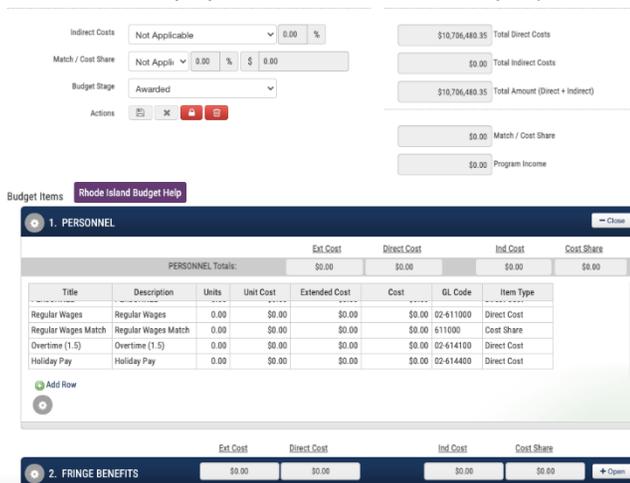
## 1.2 Confirm Final Budget & Allow Transactions to Map from RIFANS to eCivis GMS

Navigate to the **Grant Management tab**, select **My Projects**

- 1) Go to your Project Dashboard
- 2) Open the grant you would like to work with
- 3) Go to Available Action options and select “I would like to create/manage a budget for this grant”
- 4) Make sure you are in the “Awarded Budget for this grant”
- 5) If you need to adjust this budget, click OPEN icon on budget category
  - Click row you wish to edit
    - You can edit cost line, add “GL” codes, can also fix any of the units if you need to, add or edit the units or update the descriptions as necessary.
    - **GL Codes are required for RI in order to enable RIFANS mapping**
    - Title: Natural Title
    - Description: Natural Description



- GL Code:
  - For Federal Expenditure line items:
    - Account Source- Natural Account (XX-YYYYYY)
      - Example: 02-611000
    - Account Source Identifier for Federal Expenditures is “02”
  - For Match line items:
    - Natural Account **only** (611000)
- Notes:
- This is a critical field used to associate the line item with multiple data sets concatenated into a prescribed format
- This field and data work in conjunction with the RIGID defined above, to map future transactions to the correct budget line item, in the correct grant-project. It **MUST** be entered in the exact format with precise text for transactions to link to the correct line item when they are exported from RIFANS and imported into GN
- If you have line-item rows from the pre-award budget that you no longer need, please delete those rows to ensure your post-award budget is tracking the exact amount awarded.



Indirect Costs: Not Applicable 0.00 %

Match / Cost Share: Not Applicable 0.00 % \$ 0.00

Budget Stage: Awarded

Actions: [Save] [Cancel] [Delete] [Add]

\$10,706,480.35 Total Direct Costs

\$0.00 Total Indirect Costs

\$10,706,480.35 Total Amount (Direct + Indirect)

\$0.00 Match / Cost Share

\$0.00 Program Income

Budget Items **Rhode Island Budget Help**

1 PERSONNEL

		Ext Cost	Direct Cost	Ind Cost	Cost Share		
PERSONNEL Totals:		\$0.00	\$0.00	\$0.00	\$0.00		
Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Item Type
Regular Wages	Regular Wages	0.00	\$0.00	\$0.00	\$0.00	02-611000	Direct Cost
Regular Wages Match	Regular Wages Match	0.00	\$0.00	\$0.00	\$0.00	611000	Cost Share
Overtime (1.5)	Overtime (1.5)	0.00	\$0.00	\$0.00	\$0.00	02-614100	Direct Cost
Holiday Pay	Holiday Pay	0.00	\$0.00	\$0.00	\$0.00	02-614400	Direct Cost

2 FRINGE BENEFITS

SUPPORT

**Note: If you have questions about the GL code while completing your budget – please click the Purple Rhode Island Budget Help button – there you will find detailed information about the GL Code.**

- 6) When you have made the necessary adjustments – Save & Lock Final Budget
- 7) Click the lock icon “I am ready to lock this budget”
- 8) Warning will come up asking if you are sure – select Yes (Any user assigned to the



project, with edit access, can unlock a previously locked budget)

**Budget Settings**

*(This budget is locked)*

Report Column Cur  
Current Month ▼

From To  
 📅

To .  
 📅

Generate Report

Budget Stage ▼  
Post-Award

Actions Total Cost  
🔒

Budget Items Rhode Island Budget Help

## 2.0 Setting up a Child Budget for a Subproject

If you need additional budgetary and expenditure tracking as required by your Federal funder and outlined in the SF-424A Section A, you must utilize the allocation feature outlined below.

### 2.1 Grant Awarded – Setting up a Parent Grant with Child Projects - Subprojects

If you have been awarded grant funds, you will enter this in the Available Actions section of the grant in your project dashboard. This process will differ based on the stage of your grant in eCivis when funds are awarded.

#### 2.1.2 Application Submitted Stage

If the award occurs while your grant is in the “Application Submitted” stage, select “I have received my award notification and I have been awarded”:

US16317 Tribal Opioid Response (TOR) Grants - FY 2021

Stage: App. Submitted

Projected: \$500,000.00

Match: \$0.00

Available Actions

- I would like to access details of this grant
- I have received my award notification and I have been awarded
- I have received notification that I have not been awarded
- I need to resubmit my application
- I would like to create/manage goals and metrics for this grant
- I would like to create/manage a budget for this grant



To complete the process of moving this grant to the “Grant Awarded” stage:

- 1) Select ***I have received my award notification and I have been awarded*** – this takes you to the Grant Status – Grant Awarded Page
  - Fill out the required and necessary information for your notice – make sure you fill out the fields with the red asterisk as they are required

**Grant Status - Grant Awarded**

Opioid Addiction Treatment and Recovery

**Complete Status Form**

Grant: US16317 Tribal Opioid Response (TOR) Grants - FY 2019

Internal Grant ID:

Internal Grant Name:

Do you consider this a competitive grant?\*:  Yes  No

Award Notification\*:

Awarded \$\*:

Match Required\*: NO

Match Type:

Cash Match \$:

In-Kind Value:

Contract Start Date:

Contract Close Date:

Reminder:

Award Type:  Advance Payment  Reimbursement

DUNS Number:

- 2) Select the allocation options that fit how you will use your grant funds.
  - A) **State as Grantor/Pass-Through Entity**: To make funds available for pass-through funding:
 

Select “Yes” the funds are available for use as pass-through funding. You will need to allocate the quantity of pass-through funds that are available for pass-through funding:

    - Note: Pass through funding is for subawards, **not for contracts**.

**Allocation Option**

Are awarded funds to be available for use as pass-through funding?\*:  No  Yes

Amount to earmark for pass-through funding\*:

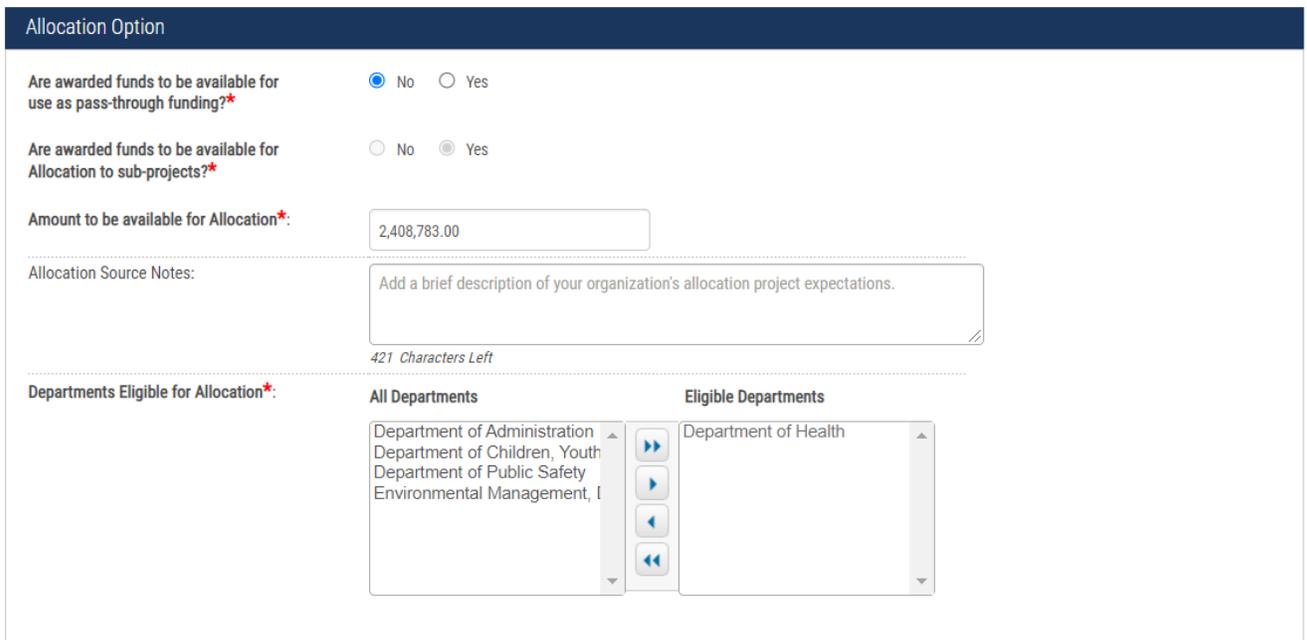
- This will be covered in greater detail in future Grantor Training sessions



**B) State as Grantee:** If you utilize subprojects in the SF 424A (See Appendix A), you will select “yes” and allocate the grant award to subprojects in the system to match the SF-424A.

- Note: For budgeting purposes, if you use this feature, all funding must be allocated to subprojects for tracking expenditures. You will need to create an Administration child subproject to budget Administration and/or Match dollars at the grant level.

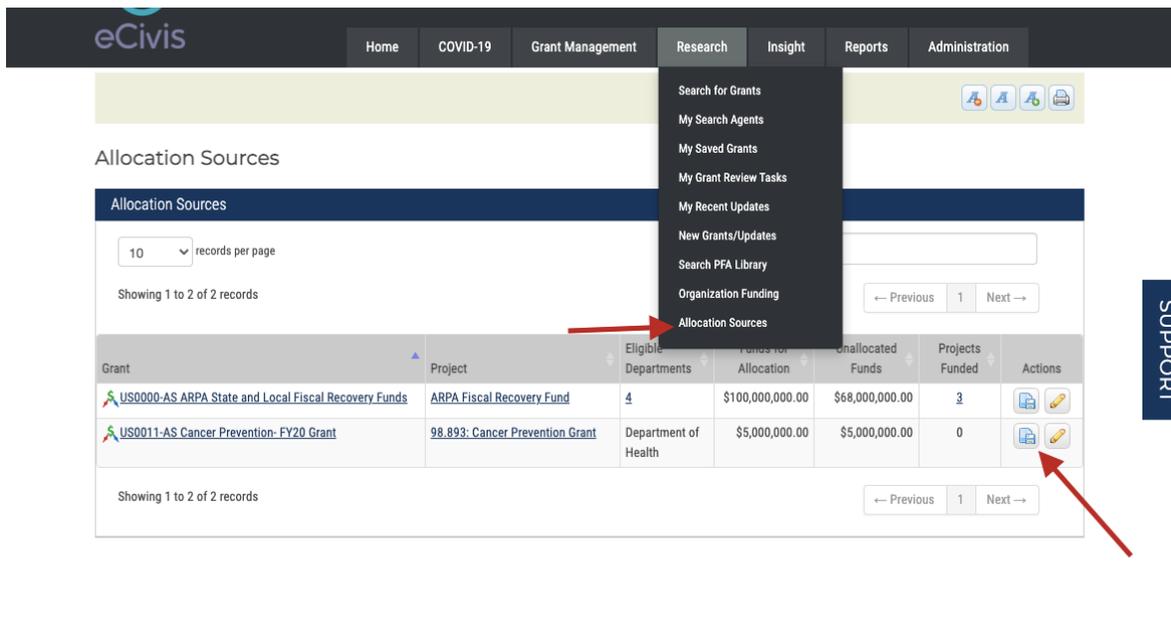
If you select “Yes” the funds are available for allocation to subprojects, you will need to fill out additional information about how the funds will be allocated:



- 3) Upload your award letter/Notice of Award any files necessary (e.g. Grant agreement, Approved budget/SF-424, any required certifications, etc.) by clicking the folder button, and click “Save”:



- 4) Now your grant is in the “Grant Awarded” stage, you MUST allocate it to subprojects to enable subproject tracking. Remember, this applies:
  - If you utilize subprojects in the SF-424A, or
  - For migrated awards with multiple line sequences only, if you are establishing a separate child subproject for each line sequence.
  
- 5) Navigate to the **Research Tab**, Select **Allocation Sources**. You will see the grant you have made available for subprojects, click **Assign Allocations**. Under the **Actions** column, select **Assign to a New Project**.



The screenshot displays the eCivis interface for managing grant allocation sources. The top navigation bar includes tabs for Home, COVID-19, Grant Management, Research, Insight, Reports, and Administration. The 'Research' tab is active, and a dropdown menu is open, showing options like 'Search for Grants', 'My Search Agents', and 'Allocation Sources'. The main content area is titled 'Allocation Sources' and features a table with the following data:

Grant	Project	Eligible Departments	Funds for Allocation	Unallocated Funds	Projects Funded	Actions
<a href="#">US0000-AS ARPA State and Local Fiscal Recovery Funds</a>	<a href="#">ARPA Fiscal Recovery Fund</a>	4	\$100,000,000.00	\$68,000,000.00	3	 
<a href="#">US0011-AS Cancer Prevention- FY20 Grant</a>	<a href="#">98.893: Cancer Prevention Grant</a>	Department of Health	\$5,000,000.00	\$5,000,000.00	0	 

A red arrow points to the 'Assign Allocations' icon in the Actions column of the second record. A vertical 'SUPPORT' button is visible on the right side of the page.

Allocation Sources

10 records per page

Showing 1 to 1 of 1 records

Grant

US0000-AS ARPA State and Local Fiscal Recovery Funds

Showing 1 to 1 of 1 records

**Assign Allocation to New Project**

I. Select Department & Project

Grant: US0000-AS ARPA State and Local Fiscal Recovery Funds

Department\*: Department of Health

Project Name\*: NCCCP- FY20 Allocation

Project Lead\*: Select Project Lead

Project Type\*:  Non-Construction  Construction

Internal Project ID:

Internal Project Name:

Project Summary\*:

Grants Network\* Home Grant Management Grant Research Insight License Agreement Contact Us Logout

- 6) Navigate to your newly created subproject by going to the **Grant Management Tab > My Projects**. This will generate a unique RIGID for each subproject, which will interface to RIFANs as an automated process on a nightly basis. You are now ready to enter your subproject budget details.

eCivis

Home COVID-19 Grant Management Research Insight Reports Administration

Project Dashboard  
Project Search  
**My Projects**  
Project Calendar  
Create Project  
Organization Documents  
Subrecipient Management

Allocation Sources

10 records per page

Showing 1 to 2 of 2 records

Grant	Project	Eligible Departments	Funds for Allocation	Unallocated Funds	Projects Funded	Actions
<a href="#">US0000-AS ARPA State and Local Fiscal Recovery Funds</a>	<a href="#">ARPA Fiscal Recovery Fund</a>	4	\$100,000,000.00	\$68,000,000.00	3	
<a href="#">US0011-AS Cancer Prevention- FY20 Grant</a>	<a href="#">98.893: Cancer Prevention Grant</a>	Department of Health	\$5,000,000.00	\$4,000,000.00	1	

Showing 1 to 2 of 2 records

SUPPORT



5) Your allocated Project Dashboard will have the grant in “Funding Allocated Status”:

Project Dashboard: NCCP- FY20 Allocation

Department: Department of Health

Data Integration Options Project Options

Overview	Documents	Grant Lifecycle	Goals & Metrics	Budgets	Contracts & Accounts	Spending	History
Active Grants  		Project Team  					
<u>US0011-AS Cancer Prevention- FY20 Grant</u>		A. Haney (Lead)		Grant Analyst			
Stage: Funding Allocated		Awarded: \$1,000,000.00		Match: \$0.00			
Available Actions							
<input type="radio"/> I would like to access details of this grant <input type="radio"/> I am ready to schedule my report <input type="radio"/> This grant does not require a report <input type="radio"/> I am ready to initiate grant closeout <input type="radio"/> I would like to view/manage my contract & account details <input type="radio"/> I would like to create/manage goals and metrics for this grant <input type="radio"/> I would like to create/manage a budget for this grant							

SUPPORT

6) You will need to create the budget for this subproject utilizing the Rhode Island Budget Template. Creating your budget will allow RIFANS to import transactions mapped to this grant’s GL Code, or Expenditure/Match – Natural.

7) Navigate to the Budget Tab and select your RI Budget Template

- **GL Codes are required for RI to enable RIFANS mapping**
- Title: Natural Title
- Description: Natural Description
- GL Code:
  - For Federal Expenditure line items:
    - Account Source- Natural Account (XX-YYYYYY)
      - Example: 02-611000
    - Account Source Identifier for Federal Expenditures is “02”
  - For Match line items:
    - Natural Account **only** (611000)
- Notes:
  - This is a critical field used to associate the line item with multiple data sets concatenated into a prescribed format
  - This field and data work in conjunction with the RIGID defined above, to map future transactions to the correct budget line item, in the correct grant-project. It **MUST** be entered in the exact format with precise text for transactions to link to the correct line item when they are exported from RIFANS and imported into GN
  - If you have line-item rows from the pre-award budget that you no longer need, please delete those rows to ensure your post-award budget is tracking the exact amount awarded.



### 2.1.2 Award Projected Stage

If the award occurs while your grant is in the “Award Projected” stage, select “I want to enter my award amount”:

US16279 State Opioid Response Grants (SOR) - FY 2020

<b>Stage:</b> Award Projected	<b>Projected:</b> \$150,000.00	<b>Match:</b> \$0.00
-------------------------------	--------------------------------	----------------------

---

Available Actions

- I would like to access details of this grant
- I want to enter my award amount
- I have received notification that I have not been awarded
- I would like to create/manage goals and metrics for this grant
- I would like to create/manage a budget for this grant

To complete the process of moving this grant to the “Grant Awarded” stage, follow the steps as show in section 1.1.1.

US16279 State Opioid Response Grants (SOR) - FY 2020

<b>Stage:</b> Grant Awarded	<b>Awarded:</b> \$150,000.00	<b>Match:</b> \$0.00
-----------------------------	------------------------------	----------------------

---

Available Actions

- I would like to access details of this grant
- I would like to request an account setup
- I am ready to schedule my report
- This grant does not require a report
- I have received a grant adjustment notice and need to amend my grant agreement
- I am ready to initiate grant closeout
- I would like to view/manage my contract & account details
- I would like to create/manage goals and metrics for this grant
- I would like to create/manage a budget for this grant

### 3.0 Verify your Umbrella Project and Grant IDs

The eCivis award hierarchy is:

1. Project: For new awards, you should establish a separate umbrella Project for each CFDA number. Then associate future awards to Projects by CFDA. Note: For each migrated award, a unique project was automatically created.
2. Grant: This is the FAIN level. There may only be one grant per FAIN.
3. Subproject/Child: Generally, this is the SF-424A Grant Program Function or Activity. For migrated awards with multiple line sequences, you may create a separate subproject for each line sequence.

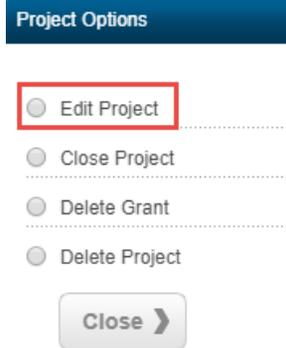


Grants Network will be integrating with the State of Rhode Island Financial System (RIFANS). The unique identifier that ties RIFANS and Grants Network together is the **Internal Grant ID** value, or RIGID. You will NOT enter this value; it will be system generated. The Project ID must be left blank; it is reserved for future use if desired. **Do not enter any data into either of these fields.**

- 1) Click on the Project Options button:



- 2) Select “Edit Project”:



- 3) The **Internal Project ID** should be blank. The **Project Name** should begin with the CFDA number, as shown in the screenshot below. The **Project Summary** should briefly describe the grants covered under the umbrella Project.

Complete Project Information

Department: Department of Health

Project Name\*: 93.898- Cancer Prevention and Control Programs for State, Territorial and Tribal Organizatic

Project Lead: Anna Haney

Project Type:  Non-Construction  Construction

Project Start Date:  

Project End Date:  

Internal Project ID: RIGID Number

Internal Project Name: DO NOT ENTER DATA

Project Summary\*: FY21 allocation

4) Click on the Contracts & Accounts Tab:

Project Dashboard: 93.898- Cancer Prevention and Control Programs for State, Territorial and Tribal Organizations

Department: Department of Health

Overview	Documents	Grant Lifecycle	Goals & Metrics	Budgets	Contracts & Accounts	Spending	History
Active Grants   ORG0009 Cancer Prevention and Control Programs for State, Territorial and Tribal Organizations - FY21 Stage: Grant Awarded      Awarded: \$2,408,783.00 *      Match: \$780,124.00				Project Team   A. Haney (Lead)      Program Manager			

- 5) Click on **+Open** beside the grant for which you are confirming to view the **Internal Grant ID**. This field may be blank when the grant is first awarded. The action of awarding the grant triggers the creation of the **Internal Grant ID** each evening. Once the **Internal Grant ID** has been created, you will see a number that looks like that shown below. As noted above, you will need to enter the 7-digit line sequence in the **Internal Grant Name** field.





## Grant Contract & Account Details

### Federal Forfeitures

Information pertains to grants "awarded" in this project.

**ORG0023 Federal Forfeitures**

Stage: Grant Awarded
Awarded: \$10,706,480.35
Match: \$0.00

**Grant Contract Summary**

Award Notification Date: 07/01/2021

Contract Start Date: 07/01/2021

Contract Close Date: 06/30/2022

Award Type:  Advance Payment  Reimbursement

Award Documents: 

Grantor Contract Number: RI004015Y

DUNS Number: 92-992-7747

**Revenue & Expense Accounts**

Search:

Account Name	Number	Type
No data available in table		

1 - 0 of 0 Accounts

**Grant Identifiers**

Internal Grant ID: SW0tps7800ySggfZNDeqzg==

Internal Grant Name: 3005118

**Notes**

## 4.0 Confirm Final Grant Budget

### 4.1 Review Stored Budget (Awarded Stage)

If you have been awarded grant funds, and are ready to review your final budget, follow these steps:

- 1) If you already entered a budget in pre-award, you may edit it now if necessary, or you may create your budget at post-award.
- 2) Keep in mind that You **MUST** enter a budget for your grants. Budgets must be entered at the parent or child level, but not both. If you do not enter budgets, transactional data cannot be mapped, reported upon, or viewed in association with the grant. RI Users are required to enter a GL Code at this stage.

### GL Code: Rhode Island Specifics

- 1 to 1 relationship between grant and tracking financials in RIFANS
- 1 to many relationships between grant and tracking financials in RIFANS
  - If you utilize subproject tracking per the SF-424A found in Appendix A, you must use the allocation feature in eCivis by creating child projects.
- Either scenario 1 or 2 may utilize the RI Construction and RI Non-Construction budget template, which will be prepopulated with budget



categories and budget line items filled out with Naturals in the “GL Code” column.

- If you need to add additional line items to track transactions, you may do so by clicking “Add Row”
    - **GL Codes are required for RI to enable RIFANS mapping**
    - Title: Natural Title
    - Description: Natural Description
    - GL Code:
      - For Federal Expenditure line items:
        - Account Source- Natural Account (XX-YYYYYY)
          - Example: 02-611000
        - Account Source Identifier for Federal Expenditures is “02”
      - For Match line items:
        - Natural Account **only** (611000)
    - Notes:
      - This is a critical field used to associate the line item with multiple data sets concatenated into a prescribed format
      - This field and data work in conjunction with the RIGID defined above, to map future transactions to the correct budget line item, in the correct grant-project. It **MUST** be entered in the exact format with precise text for transactions to link to the correct line item when they are exported from RIFANS and imported into GN
      - If you have line-item rows from the pre-award budget that you no longer need, please delete those rows to ensure your post-award budget is tracking the exact amount awarded.
- 3) For each budget line, you must select Direct, Indirect, or Cost Share
- 4) In the Project Dashboard, click the name of the grant for which you wish to confirm the final budget. When the Available Actions list appears, click “I would like to create/manage a budget for this grant”:



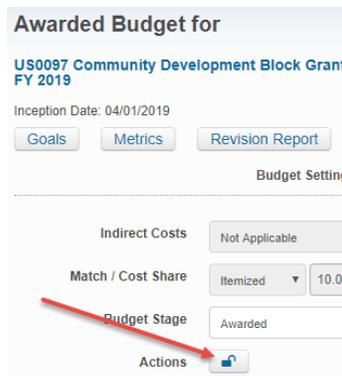
FD16917 Institute for Intergovernmental Research (IIR): Rural Responses to the Opioid Epidemic - FY 2019

Stage: Grant Awarded      Awarded: \$525,000.00 \*      Match: \$0.00

Available Actions

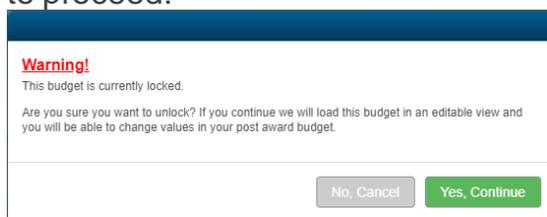
- I would like to access details of this grant
- I would like to request an account setup
- I am ready to schedule my report
- This grant does not require a report
- I have received a grant adjustment notice and need to amend my grant agreement
- I am ready to close this grant
- I would like to view/manage my contract & account details
- I would like to create/manage goals and metrics for this grant
- I would like to create/manage a budget for this grant

- 5) You will be taken to the existing budget for that grant automatically. Click on the padlock icon to unlock the budget and make it editable:



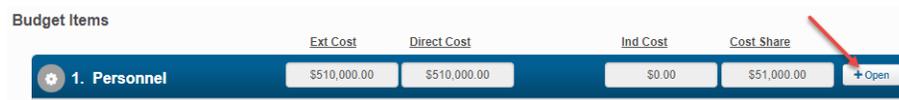
**Awarded Budget for**  
 US0097 Community Development Block Grant  
 FY 2019  
 Inception Date: 04/01/2019  
 Goals Metrics Revision Report  
 Budget Settings  
 Indirect Costs: Not Applicable  
 Match / Cost Share: Itemized 10.0  
 Budget Stage: Awarded  
 Actions: [Padlock Icon]

You will see a pop-up that warns you that the budget is locked. Click “Yes, Continue” to proceed:



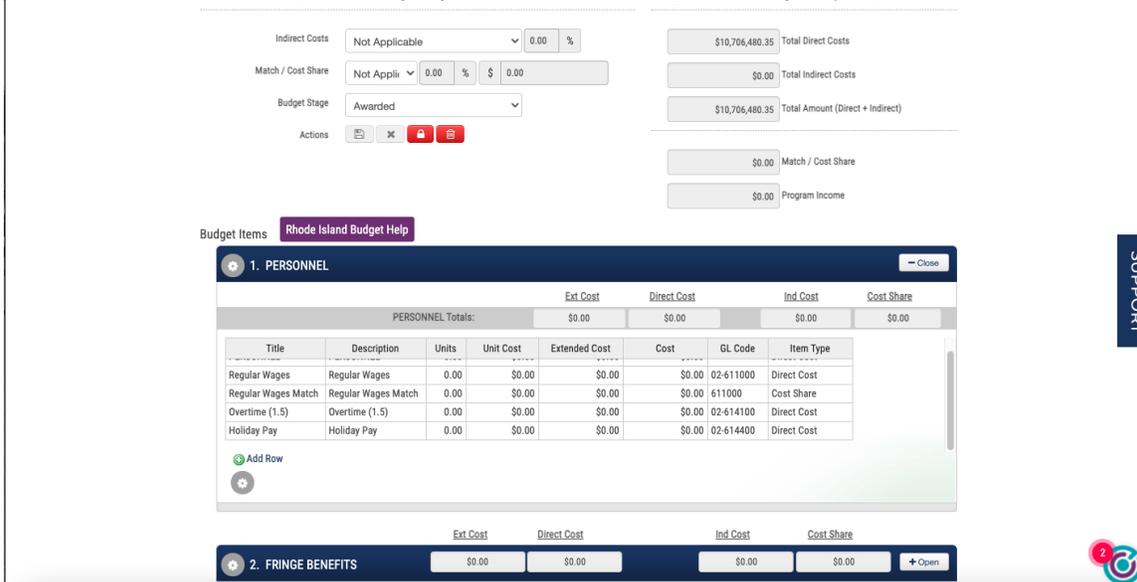
**Warning!**  
 This budget is currently locked.  
 Are you sure you want to unlock? If you continue we will load this budget in an editable view and you will be able to change values in your post award budget.  
 No, Cancel    Yes, Continue

- 6) Click on the “+Open” button at the far right of the first Budget Item you wish to review. This will open a detailed view of your Budget Item line items:



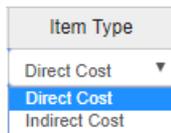
	Ext Cost	Direct Cost	Ind Cost	Cost Share	
1. Personnel	\$510,000.00	\$510,000.00	\$0.00	\$51,000.00	+ Open

7) Edit any of the data you see by double-clicking into the cell you wish to edit:

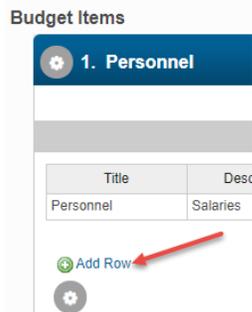


The screenshot shows a budget summary at the top with fields for Indirect Costs, Match / Cost Share, and Budget Stage. Below this is a 'Budget Items' window titled 'Rhode Island Budget Help' showing a table for '1. PERSONNEL'. The table has columns for Title, Description, Units, Unit Cost, Extended Cost, Cost, GL Code, and Item Type. The 'Item Type' column is highlighted, indicating it can be edited.

NOTE: If you wish to edit the “Item Type” cell, click in the cell once to select from a drop-down menu:



8) If you need to add a line item, click “Add Row”:



The screenshot shows the 'Budget Items' window with a table containing one row: 'Personnel' with 'Salaries' in the description. Below the table is a green 'Add Row' button with a plus sign, which is highlighted by a red arrow.

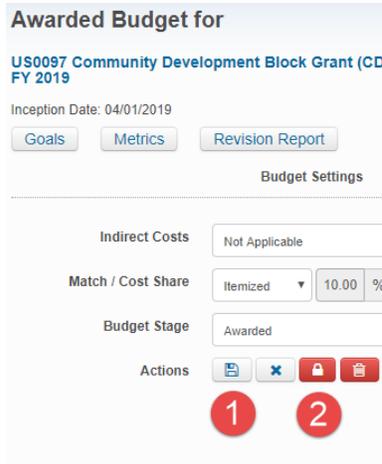
Enter the necessary data into the newly added row.

9) If you wish to delete a row, right-click on the row and select “Delete Row” from the menu that appears:



The screenshot shows a table row with a right-click context menu open. The menu options are 'Insert row above', 'Insert row below', and 'Remove row'.

10) Once you have reviewed your final budget, and have confirmed that all the line items and Budget Items are correct, click the “Save” icon, then the “Lock” icon:



**Awarded Budget for**  
 US0097 Community Development Block Grant (CD FY 2019)  
 Inception Date: 04/01/2019  
 Goals Metrics Revision Report  
 Budget Settings  
 Indirect Costs: Not Applicable  
 Match / Cost Share: Itemized 10.00 %  
 Budget Stage: Awarded  
 Actions: [Save] [Lock] [Unlock] [Print]

NOTE: This is the only way to ensure that your changes are saved, and the final version of your budget is locked. Only a project team member, with edit capabilities, can unlock the budget after it has been locked.

11) From the Budget Stage menu, select “Post-Award”. This ensures that your budget will accept budget data integrations, and allocations will be organized properly.

**NOTE: Locking the budget is what initiates the eCivis to RIFANS integration.**

#### 4.2 Review Stored Budget (Post-Award Stage)

1) Review the Budget Summary in the upper right corner of the budget page to ensure that all spending totals are correct and consistent with your SF-424:

Budget Summary			
Current Month Expenditure	\$0.00	\$3,088,000.00	Total Direct Costs
Total Expenditure to Date	\$916,218.97	\$28,000.00	Total Indirect Costs
Total Available Balance	\$2,199,781.03	\$3,116,000.00	Total Awarded
Percent Expenditure	29.40%	\$309,418.80	Match / Cost Share
		\$0.00	Program Income

If they are not, there could be an issue with your budget line items.



- 2) You can see a Budget Item-level breakdown of expenditures, and the remaining balance grant funds for each Budget Item below:

Budget Items

1. Personnel <span style="float: right;">Close</span>						
	Total Awarded	Total Cost	Current Month	ITD	Balance	Spent %
Personnel Totals:	\$510,000.00	\$510,000.00	\$0.00	\$157,098.00	\$352,902.00	30.80%

- 3) If your expenditures do not look correct for the period you have in mind, note that the default expenditure period is the current month.

Budget Items

1. Personnel <span style="float: right;">Close</span>						
	Total Awarded	Total Cost	Current Month	ITD	Balance	Spent %
Personnel Totals:	\$510,000.00	\$510,000.00	\$0.00	\$157,098.00	\$352,902.00	30.80%

- 4) To view your expenditures based on a custom date range: Lock your report by clicking the padlock icon:

Post-Award Budget for

US0097 Community Development Block Grant (CD FY 2019)

Inception Date: 04/01/2019

Goals Metrics Revision Report

Budget Settings

Indirect Costs: Not Applicable

Match / Cost Share: Itemized 9.93 %

Budget Stage: Post-Award

Actions:    

- 5) Click on the drop-down menu beside “Report Column” to determine the date range of your expenditure report:



### Post-Award Budget for

**US0097 Community Development Block  
FY 2019**

Inception Date: 04/01/2019

Goals Metrics Revision Rep

#### Budget Settings

(This budget is locked)

Report Column Custom Dates

From Custom Dates

6) Select your To and From dates with the calendar icons:

Report Column Custom Dates Custom

From 10/24/2019

To

Budget Stage

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Budget Stage	26	27	28	29	30	31	1
Actions	2	3	4	5	6	7	8
Uncate	9	10	11	12	13	14	15
	16	17	18	19	20	21	22
GL C	23	24	25	26	27	28	29
9999-003	1	2	3	4	5	6	7
4444-002							

7) Click “Generate Report”:

Report Column Custom Dates

From 10/24/2019

To 02/05/2020

Generate Report

8) Once you click “Generate Report,” all of your Budget Item sections will convert from “Current Month” to “Custom Dates”

Budget Items

1. Personnel						
	Total Awarded	Total Cost	Custom Dates	ITD	Balance	Spent %
Personnel Totals:	\$510,000.00	\$510,000.00	\$32,920.00	\$157,098.00	\$352,902.00	30.80%

If you have confirmed your line-item expenditures, and still see Total Expenditure to Date discrepancies, you may have some Uncategorized



Transactions to resolve.

### 4.3 Uncategorized Transactions

Uncategorized Transactions occur when data enters your Grants Network account that has a GL Code that does not match what is in your existing budget. Without a way to organize these line items, they become “Uncategorized Transactions” because they cannot be categorized/matched to a Budget Item. Here’s how to manually correct Uncategorized Transactions:

If this happens to you, these are some things to check:

- Make sure that you have entered allocations correctly (focus on GL CODE)
- You have not overwritten the Internal Grant ID

7) Click the padlock icon to unlock your budget, and click “Yes, Continue” to proceed:



8) Locate the Uncategorized Transaction you wish to correct in your budget. There is a list of Uncategorized Transactions below your Budget Summary:

Uncategorized Transactions						Close
GL Code	Name	Trans Id	Post Date	Amount	Trans Number	
5555-002	Payment to Satterfield, Lemke and Jaskolski	trans-000000346	04/05/2019	\$577.88		
9999-003	Project Director Worker's Comp	trans-000000245	04/05/2019	\$933.44		
4444-002	Payment to Gaylord, Konopelski and Bradtke	trans-000000356	04/07/2019	\$1,041.67		

9) Find the Budget Item where the Uncategorized Transaction belongs, and click “+Open” on the Budget Item:

	Total Cost	Current Month	ITD	Balance	Spent %	
5. Supplies	\$66,500.00	\$0.00	\$5,635.47	\$60,864.53	8.47%	+ Open

10) Click “Add Row”:



**5. Supplies**

Title	
Supplies	Offic
Supplies	Soft

[Add Row](#)

11) Enter the data from your Uncategorized Transaction into the new row:

Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Cost Share	Item Type
Supplies	Software	1.00	\$37,500.00	\$37,500.00	\$37,500.00	4444-02	\$3,750.00	Direct Cost
Supplies	Office Materials	0.00	\$577.88	\$577.88	\$577.88	5555-002	\$0.00	Direct Cost

[Add Row](#)

12) Click “Save”:

**Post-Award Budget for**  
**US0097 Community Development Block Grant (CDI FY 2019)**

Inception Date: 04/01/2019

[Goals](#) [Metrics](#) [Revision Report](#)

**Budget Settings**

Indirect Costs: Not Applicable

Match / Cost Share: Itemized 9.93 %

Budget Stage: Post-Award

Actions: [Print](#) [Close](#) [Lock](#) [Delete](#)

13) This will prompt a “New Note” pop-up to appear. Enter any notes you wish to add, and click “Save”:

**Budget Notes**

**Revisions:**

- Budget Created by K. Wolterstorff on 11-15-19 07:34 AM
- Pre-award budget entered  
Budget Saved by K. Wolterstorff on 11-15-19 07:54 AM
- Grant Awarded by K. Wolterstorff on 11-15-19 08:30 AM
- Updated GL #'s  
Budget Saved by K. Wolterstorff on 11-21-19 12:29 PM
- Budget Locked by K. Wolterstorff on 12-04-19 06:54 AM
- Updated GLs for Personnel  
Budget Saved by K. Wolterstorff on 12-04-19 08:00 AM

**New Note:**

Added line item to resolve Uncategorized Transaction for Satterfeld, Lemke and Jaskolski.]

910 characters remaining.

[Cancel](#) [Save](#)



14) Finish by locking your budget by clicking the padlock button:

**Post-Award Budget for**

**US0097 Community Development Block Grant (CD FY 2019)**

Inception Date: 04/01/2019

[Goals](#) [Metrics](#) [Revision Report](#)

---

**Budget Settings**

---

Indirect Costs	Not Applicable	
Match / Cost Share	Itemized ▾	9.93 %
Budget Stage	Post-Award	
Actions		  

Now, any Uncategorized Transactions that you added to Budget Items will no longer be in the Uncategorized Transactions list.



# Appendix A: RI SF-424A All Components

BUDGET INFORMATION - Non-Construction Programs						
SECTION A - BUDGET SUMMARY						
Grant Program Function or Activity (a)	Catalog of Federal Domestic Assistance Number (b)	Estimated Unobligated Funds		New or Revised Budget		
		Federal (c)	Non-Federal (d)	Federal (e)	Non-Federal (f)	Total (g)
1. NBCCEDP	93.898			\$1,512,970.00	\$504,323.00	\$2,017,293.00
2. NCCCP	93.898			\$439,781.00		\$439,781.00
3. NPCR-1 (Core)	93.898			\$315,294.00	\$228,888.00	\$544,182.00
4. NPCR-2 (Screening)	93.898			\$140,738.00	\$46,913.00	\$187,651.00
5. Totals				\$2,408,783.00	\$780,124.00	\$3,188,907.00

SECTION B - BUDGET CATEGORIES					
6. Object Class Categories	GRANT PROGRAM, FUNCTION OR ACTIVITY				Total (5)
	(1) NBCCEDP	(2) NCCCP	(3) NPCR-1 (Core)	(4) NPCR-2 (Screening)	
a. Personnel	\$432,553.00	\$112,005.00	\$53,074.00	\$28,776.00	\$626,408.00
b. Fringe Benefits	\$282,921.00	\$62,114.00	\$28,632.00	\$15,678.00	\$389,345.00
c. Travel	\$4,448.00	\$5,340.00	\$2,970.00		\$12,758.00
d. Equipment					
e. Supplies	\$6,360.00	\$9,016.00	\$600.00		\$15,976.00
f. Contractual	\$715,655.00	\$129,438.00	\$287,447.00	\$69,607.00	\$1,202,147.00
g. Construction					
h. Other	\$575,356.00	\$71,661.00	\$154,414.00	\$62,083.00	\$863,514.00
i. Total Direct Charges (sum of 6a-6h)	\$2,017,293.00	\$389,574.00	\$527,137.00	\$176,144.00	\$3,110,148.00
j. Indirect Charges		\$50,207.00	\$17,045.00	\$11,507.00	\$78,759.00
k. TOTALS (sum of 6i and 6j)	\$2,017,293.00	\$439,781.00	\$544,182.00	\$187,651.00	\$3,188,907.00

7. Program Income					
-------------------	--	--	--	--	--

Authorized for Local Reproduction

Standard Form 424A (Rev. 7-97)  
Prescribed by OMB Circular A-102

Previous Edition Usable

Your grant budget in eCivis must tie to the values in the budget categories in Section B. 6, at either the parent or child level, as applicable.

Your match values, denoted as Cost Share in eCivis, must tie to the values in Section C, non-federal resources, at either the parent or child level, as applicable.



Column A in Section A outlined above indicates the RI user MUST use the allocation method for Parent-Child relationships, described on page 26

SECTION C - NON-FEDERAL RESOURCES					
(a) Grant Program	(b) Applicant	(c) State	(d) Other Sources	(e) TOTALS	
8. NBCCEDP		\$70,836.00	\$433,487.00	\$504,323.00	
9. NCCCP					
10. NPCR-1 (Core) - Matching and MOE		\$86,212.00	\$142,676.00	\$228,888.00	
11. NPCR-2 (Screening)			\$46,913.00	\$46,913.00	
12. TOTAL (sum of lines 8-11)		\$157,048.00	\$623,076.00	\$780,124.00	
SECTION D - FORECASTED CASH NEEDS					
	Total for 1st Year	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
13. Federal	\$2,408,783.00	\$602,195.75	\$602,195.75	\$602,195.75	\$602,195.75
14. Non-Federal	\$780,124.00	\$195,031.00	\$195,031.00	\$195,031.00	\$195,031.00
15. TOTAL (sum of lines 13 and 14)	\$3,188,907.00	\$797,226.75	\$797,226.75	\$797,226.75	\$797,226.75
SECTION E - BUDGET ESTIMATES OF FEDERAL FUNDS NEEDED FOR BALANCE OF THE PROJECT					
(a) Grant Program	FUTURE FUNDING PERIODS (Years)				
	(b) First	(c) Second	(d) Third	(e) Fourth	
16. NBCCEDP	\$1,512,970.00				
17. NCCCP	\$439,781.00				
18. NPCR-1 (Core)	\$315,294.00				
19. NPCR-2 (Screening)	\$140,738.00				
20. TOTAL (sum of lines 16-19)	\$2,408,783.00				
SECTION F - OTHER BUDGET INFORMATION					
21. Direct Charges: \$2,330,024.00		22. Indirect Charges: \$78,759.00			
23. Remarks: For NBCCEDP indirect costs are not permitted. For NCCCP, NPCR-1, & NPCR-2, the federally approved indirect cost rate is 19.3% of direct costs less equipment and contracts (subawards).					

Authorized for Local Reproduction

Standard Form 424A (Rev. 7-97) Page 2



## Appendix B: Data Dictionary:

**GL Code:** The value that you enter as a user into the GL Code field is very important to the overall integration and functioning of your GMS in tracking grants in the specific way that Rhode Island requires. What you will enter in this field is dependent on which scenario you require:

1. 1 to 1 relationship between grant and tracking financials in RIFANS
2. 1 to many relationships between grant and tracking financials in RIFANS
  - If you utilize subproject tracking per the SF-424A found in Appendix A, you must use the allocation feature in eCivis.
- For Federal Expenditure line items:
  - Account Source- Natural Account (XX-YYYYYY)
    - Example: 02-611000
      - Account Source Identifier for Federal Expenditures is “02”
  - For Match line items:
    - Natural Account **only** (611000)

### Notes:

- This is a critical field used to associate the line item with multiple data sets concatenated into a prescribed format
- This field and data work in conjunction with the RIGID defined above, to map future transactions to the correct budget line item, in the correct grant-project. It **MUST** be entered in the exact format with precise text for transactions to link to the correct line item when they are exported from RIFANS and imported into GN
- If you have line-item rows from the pre-award budget that you no longer need, please delete those rows to ensure your post-award budget is tracking the exact amount awarded.

**Internal Grant ID:** This value is referred to as the RIGID, or Rhode Island specific unique identifier. This value is system generated and populated after the grant is awarded as part of a nightly maintenance process. This value ties together the Rhode Island Financial Management system and eCivis GMS. Please **DO NOT** enter a value into this field. If you do, it will be overwritten with the correct RIGID each night.

**Internal Project ID:** This field is not utilized today but may be in the future. Leave this field blank.



**Internal Grant Name:** This value is populated as part of the nightly integration process. The value that you will see in this field in the line sequence entered RIFANS. Please do not enter this field.

**RIGID:** Rhode Island Grant Identifier. This is a unique code auto generated by the eCivis system that is used to identify projects and grants within eCivis and RIFANS.

