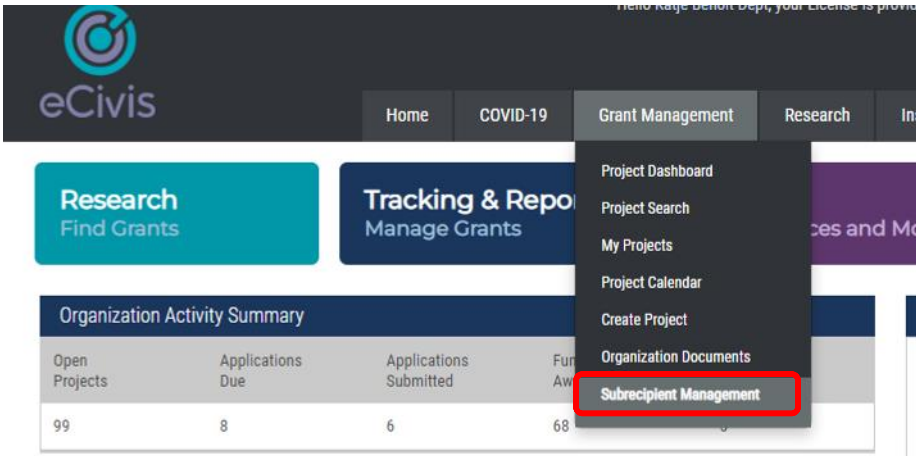
RI Specific: Grantor Post-Award Management

This guide will walk through post-award tasks in eCivis. For instructions on how to award a subrecipient, reference the [Award Recommendations and the Awarding Process guide].

Contents

Grantor Program Dashboard

The Program Dashboard is the landing page for the Grantor side of eCivis. Navigate to the grantor side of eCivis by hovering over the *Grant Management* tab and selecting *Subrecipient Management*.



This will open the Program Dashboard. At the top of the page are some action buttons:

Add New Program – Used to initiate the creation of a new subrecipient grant program.

Generate Task Report – Used to view both pending and completed tasks for a subrecipient grant program or across multiple subrecipient grant programs. For more information, reference the RI Guide to GMS Reports.

Generate Funding Source Report – Used to view the different funding sources (federal and non-federal) that are funding each subrecipient grant program in your agency. For more information, reference the RI Guide to GMS Reports.

Public Solicitations Listing – Access to the links and iFrame of publicly listed solicitations that can be used for embedding in your agency website. Additionally, all publicly listed solicitations will be automatically posted to the State of Rhode Island Grant Funding Opportunities page.

Subrecipient Monitoring – Allows you to view previously completed and pending subrecipient monitoring tasks, as well as initiate new subrecipient monitoring tasks. For all subrecipient monitoring functionality and information, reference the Subrecipient Monitoring guide.

Scrolling down on the *Program Dashboard,* is *Your Pending Tasks* table. This table summarizes all tasks that are currently in your approval queue that need to be reviewed/approved across all subrecipient grant programs. Instructions on how to review and approve the different task types will be covered in this document.

Search:

Your Pending Tasks

Program	Project	Org Name	Award/ Contract Number	Created Date	Invoice Number	Task Type	Actions
No Budget DA	No Budget test 2	WOB		06/02/2022		Financial Report Approval	Visit Program
Chamber of Commerce Program	test	Katje's Organization	RI-KB-001	02/09/2023		Final Award Approval	Visit Program
Chamber of Commerce Program	DTA 02092023	Katje's Organization		02/15/2023		Final Award Approval	Visit Program
Direct Award Test2	Goals Test	Katje's Organization	RI-TEST-2022-003	02/21/2023		Activity Report Approval	Visit Program
Chamber of Commerce Program	RI Chamber Project	Katje's Organization	COCP-FY23-0001	02/24/2023		Amendment Approval	Visit Program

Showing 1 to 5 of 5 entries

Previous 1 Next

Reload

The last section of the *Program Dashboard* is the *Program Solicitations* table for your agency. Here you can find all subrecipient grant programs and their status. You can use the *Search* bar to find a specific grant program and clicking on the hyperlinked *Title* will open the respective *Program Detail Page.* If you have previously archived a grant program, you can view it by unchecking the *Hide Archived Programs* button.

Show 25 entries

Search:

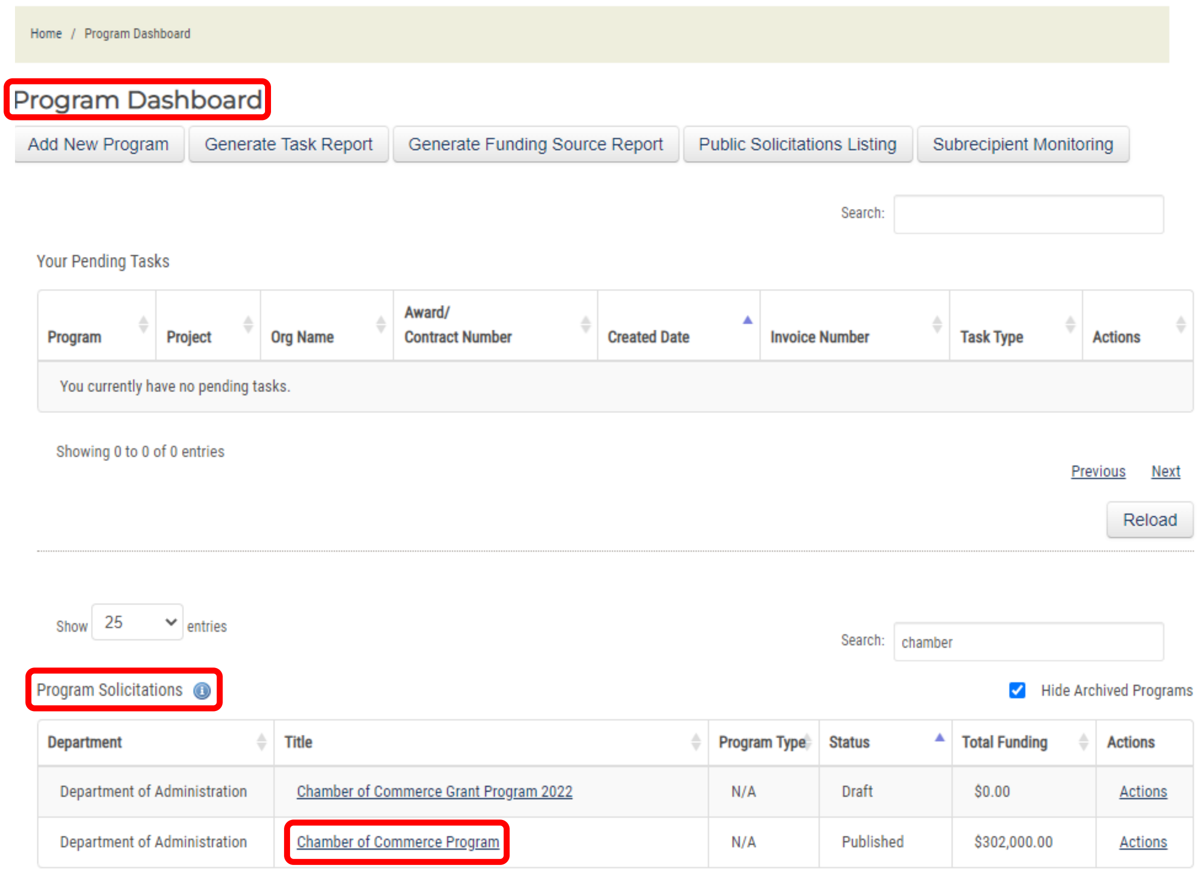
Program Solicitations

Hide Archived Programs

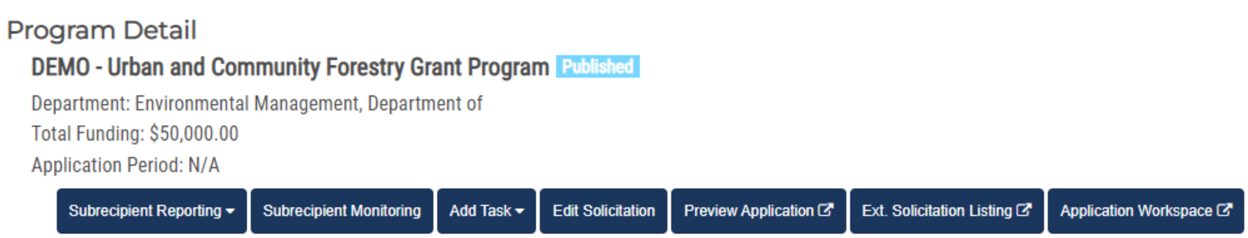
Department	Title	Program Type	Status	Total Funding	Actions
Department of Administration	ABC Grant Program	N/A	Draft	$85,000.00	Actions
Department of Administration	ARPA - test	N/A	Draft	$0.00	Actions
Department of Administration	CDBG- FY23	N/A	Draft	$400,000.00	Actions

Overview of the Program Detail Page

On the *Program Dashboard,* scroll down to view the *Program Solicitations* table and click on the appropriate subrecipient grant program title.



At the top of each *Program Detail* page will be summary information about the subrecipient grant program (Department, Total Funding, Application Period) and action buttons:



Subrecipient Reporting – Allows you to pull reports with subrecipient award information, activity report information, and budget information. For more detailed instruction, reference the RI Guide to GMS Reports.

Subrecipient Monitoring – Allows you to view previously completed and pending subrecipient monitoring tasks, as well as initiate new subrecipient monitoring tasks. For all subrecipient monitoring functionality and information, reference the Subrecipient Monitoring guide.

Add Task – Allows you to add either a Miscellaneous Task or a Monitoring Task

> **Miscellaneous Task:** Creation of a task for the subrecipient(s) to complete that could not be captured through a Financial Report (Payment Request) or an Activity Report. Miscellaneous Tasks can also be created for internal state agency users. For instructions on creating and assigning both internal and external Miscellaneous Tasks, reference the Miscellaneous Tasks section of this document.
>
> **Monitoring Task:** Creation of a subrecipient monitoring task. For all subrecipient monitoring functionality and information, reference the Subrecipient Monitoring guide.

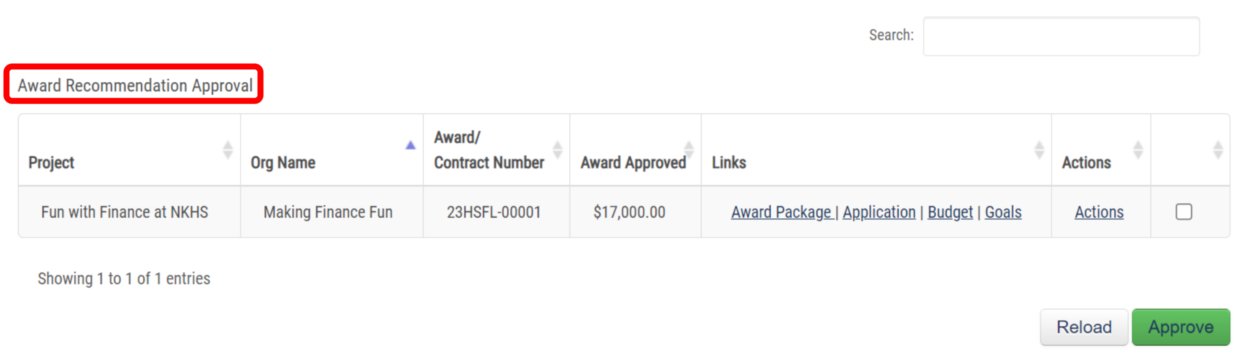
Edit Solicitation – Opens your solicitation so information can be edited. If needed, the following can be edited through the Solicitation: Funding Sources for the grant program, Approval Workflows, Detailed Financial Report Options.

Preview Application – Opens a copy of the application used for this subrecipient grant program (if it was competitive).

Ext. Solicitation Listing – Opens the external solicitation listing, how applicants see it.

Application Workspace – If this was a competitive program, this opens the Zengine Application Workspace for users with access to that specific workspace.

The first table on the *Program Detail* page is the *Award Recommendation Approval* table. If you are in the approval pathway for Recommendation Approvals, then listed here will be all award recommendations that are pending your review/approval for this specific subrecipient grant program. For more detailed instructions on reviewing and approving award recommendations, reference the Award Recommendations and the Awarding Process user guide.



Next is the *Pending Awards* table. Here you can view all pending awards and their current status. For more detailed instructions on pending awards, reference the Award Recommendations and the Awarding Process user guide.

Search:

Pending Awards

Project	Org Name	Award Manager	Award/ Contract Number	Recommendation Status	Current Approver	Actions
Project Title	Katje's Organization			Recommendation Pending (Direct)	N/A	Actions
Award Rec Award	Katje's Organization	K. Benoit		Pending Recommendation Approval	Katje Benoit	Actions
DTA 02092023	Katje's Organization	K. Benoit		Pending Final Approval	Katje Benoit	Actions
test	Katje's Organization	K. Benoit	RI-KB-001	Pending Final Approval	Katje Benoit	Actions

Showing 1 to 4 of 4 entries

Previous 1 Next

Reload

Next will be your *Pending Tasks* table. This table summarizes all tasks that are currently in your approval workflow that need to be reviewed/approved for this specific grant program. Instructions on how to review and approve the different task types will be covered in this document.

Search:

Pending Tasks

Project	Org Name	Award/ Contract Number	Task Type	Reporting Period	Award Type	Invoice Number	Current Status	Submitted Date	Actions
RI Chamber Project	Katje's Organization	COCP-FY23-0001	Amendment Approval		N/A		Pending Approval	02/24/2023	Actions
test	Katje's Organization	RI-KB-001	Final Award Approval		N/A		Final Award Approval	02/09/2023	Actions
DTA 02092023	Katje's Organization		Final Award Approval		N/A		Final Award Approval	02/15/2023	Actions

Showing 1 to 3 of 3 entries

Previous 1 Next

Reload

At the bottom of each *Program Detail* page is the *Subrecipient Awards* table. All subrecipients that have been awarded will be listed here along with some summary award information. To access more detail about each subrecipient, click on the hyperlinked *Project* name.

Subrecipient Awards

Project	Organization	Award Manager	Award/ Contract Number	Award Type	Status	Contract Start	Contract End	Total Award
RI Chamber Project	Katje's Organization	K. Benoit	COCP-FY23-0001	N/A	Awarded	12/01/2022	12/31/2024	$900.00

Overview of the Subrecipient Detail Page

From the *Program Detail* page, scroll down to the *Subrecipient Awards* table. Locate the subrecipient you want to view and click on the hyperlinked *Project* name.

Subrecipient Awards

Project	Organization	Award Manager	Award/ Contract Number	Award Type	Status	Contract Start	Contract End	Total Award
RI Chamber Project	Katje's Organization	K. Benoit	COCP-FY23-0001	N/A	Awarded	12/01/2022	12/31/2024	$900.00

There are 5 primary sections of a *Subrecipient Detail* page where you can navigate and perform various actions.

The *Award Detail* section shows the subrecipient's award details, as accepted by the subrecipient and approved by your state agency.

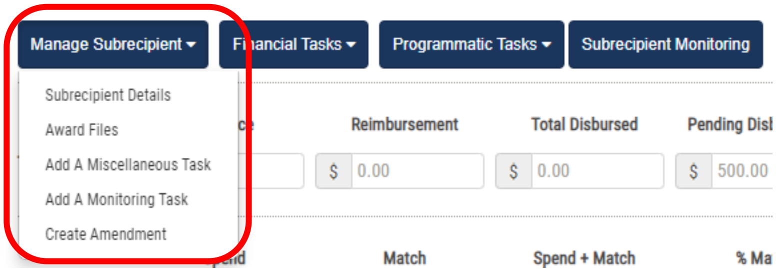
Subrecipient Detail

Award Detail

Subrecipient: A New Leaf - 124 Main Street
Vendor ID: 85-963
Organization: Katje's Organization
Project: RI Chamber Project
Award Manager: K. Benoit
Award Status: Awarded
Approval Date: 12/12/2022 - View Approval Workflow
Approved Amount: $900.00 +
Total Federal Award: $450.00
Total Other Award: $450.00
Total Match: $0.00
Performance Period: 12/01/2022 - 12/31/2024

Program: Chamber of Commerce Program
Award/Contract Number: COCP-FY23-0001
EIN: 12-3456789
Subrecipient Risk: Low
Award Type: N/A

Below the *Award Detail* section are the view/edit actions.



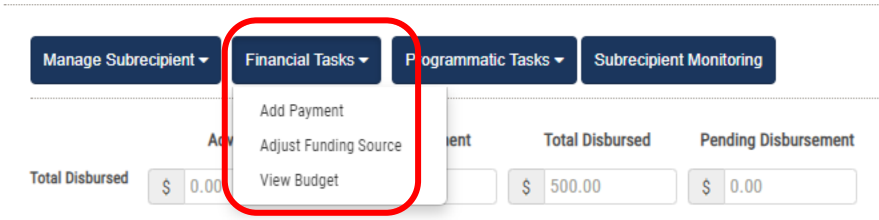
Subrecipient Details – This will open a pop-up where you can view/edit information about the subrecipient. For more information, reference the Manage Subrecipient Options section of this document.

Award Files – Use this button to view the subrecipient's award files (both external and internal). Internal files (only visible to the state agency) can also be added here.

Add a Miscellaneous Task: Creation of a task for the subrecipient to complete that could not be captured through a Financial Report (Payment Request) or an Activity Report. Miscellaneous Tasks can also be created for internal state agency users. For instructions on creating and assigning both internal and external Miscellaneous Tasks, reference the Miscellaneous Tasks section of this document.

Add a Monitoring Task: Creation of a subrecipient monitoring task. For all subrecipient monitoring functionality and information, reference the Subrecipient Monitoring guide.

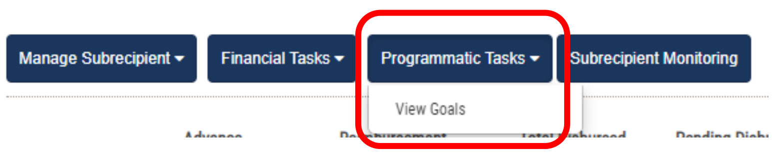
Create Amendment – Allows you to initiate an amendment for the subrecipient. Grantor initiated amendments can be used to make changes to the Performance Period End Date, any change to the budget, target units for Goals and Subgoals. For more information, reference the Grantor Initiated Amendments section of this document.



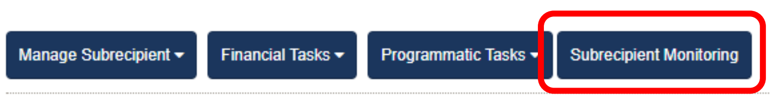
Add Payment – This button is for eCivis clients that do not have an integration with their financial system. Rhode Island's instance of eCivis is integrated with RIFANS, allowing subrecipient payment requests and payment information to be mapped over automatically. **This button should never be used by a state agency user without consultation with the GMO first, as it will prevent necessary payment request information from being sent to RIFANS.**

Adjust Funding Source – Allows you to edit the funding source(s) attached to this subrecipient award. At this time, only GMO permissions can utilize this functionality. If you need to adjust the funding source(s) of a subrecipient award, contact the GMO.

View Budget – Allows you to view the subrecipient's approved budget, broken down by budget category and line item detail.



View Goals – Allows you to view the subrecipient's goals and subgoals, along with their defined target units.



Subrecipient Monitoring – Allows you to view previously completed and pending subrecipient monitoring tasks, as well as initiate new subrecipient monitoring tasks. For all subrecipient monitoring functionality and information, reference the Subrecipient Monitoring guide.

Next, you will see a financial summary of the approved spending and paid disbursements to date for this subrecipient.

	Advance	Reimbursement	Total Disbursed	Pending Disbursement
Total Disbursed	$ 0.00	$ 500.00	$ 500.00	$ 80.00

	Spend	Match	Spend + Match	% Match
Total Approved	$ 900.00	$ 0.00	$ 900.00	0 %
Total Spend	$ 580.00	$ 0.00	$ 580.00	0 %
Total Remaining	$ 320.00	$ 0.00	$ 320.00	0 %

	Received	Expended	Balance
Program Income	$ 0.00	$ 0.00	$ 0.00

Note: For Rhode Island, the *Advance Total Disbursed* amount should always be $0 because that functionality does not link to RIFANS. Any advances disbursed to date via subrecipient Financial Reports in eCivis will be included in the *Reimbursement Total Disbursed* amount.

Below the financial summary is the subrecipient's *Award Activity* table. This table lets you view all reports/tasks submitted by the subrecipient along with their current status. Clicking on the hyperlinked *Current Status* allows you to view where the report is in the approval workflow including any comments from the subrecipient and/or agency users. Under the *Actions* column, you can open a view-only copy of the report. If you need to review/approve a pending report, you must return to your *Pending Tasks* table on the *Program Detail* page or *Program Dashboard.*

Award Activity

Show 10 entries

Search:

Activity	Reporting Period	Submit Date	Invoice Number	Current Status	Actions
Financial Report	01/01/2023 - 01/07/2023	01/10/2023		Approved / Paid	Actions
Financial Report	02/01/2023 - 02/28/2023	02/09/2023		Approved / Awaiting Payment	Actions

Showing 1 to 2 of 2 entries

Previous 1 Next

Reload

Next will be the *Subrecipient Pending Tasks* table. This table shows all tasks that have been assigned to the subrecipient along with their due date. More information about removing these tasks or redefining their frequency is covered in the [Updating the Subrecipient's Report Task Schedule] section of this document.

Subrecipient Pending Tasks

Redefine Financial Report Tasks | Redefine Activity Report Tasks

Show 10 entries

Search:

Task Type	Due Date	Actions
Financial Report Request	02/28/2023	Actions
Activity Report Request	02/28/2023	Actions
Financial Report Request	05/31/2023	Actions
Financial Report Request	08/31/2023	Actions
Financial Report Request	11/30/2023	Actions
Financial Report Request	02/29/2024	Actions

Finally, the last table shows the subrecipient's *Award Amendments* that have been submitted along with their current status. Clicking on the hyperlinked *Current Status* allows you to see where in the approval workflow the submitted amendment is, and the hyperlinked *View Amendment* allows you to open a view-only copy of the amendment. If you need to review/approve a pending amendment, you must return to your *Pending Tasks* table on the *Program Detail* page or *Program Dashboard.*

Award Amendments

Search:

Amendment Date	Current Status	Actions
02/23/2023	Pending Approval	View Amendment

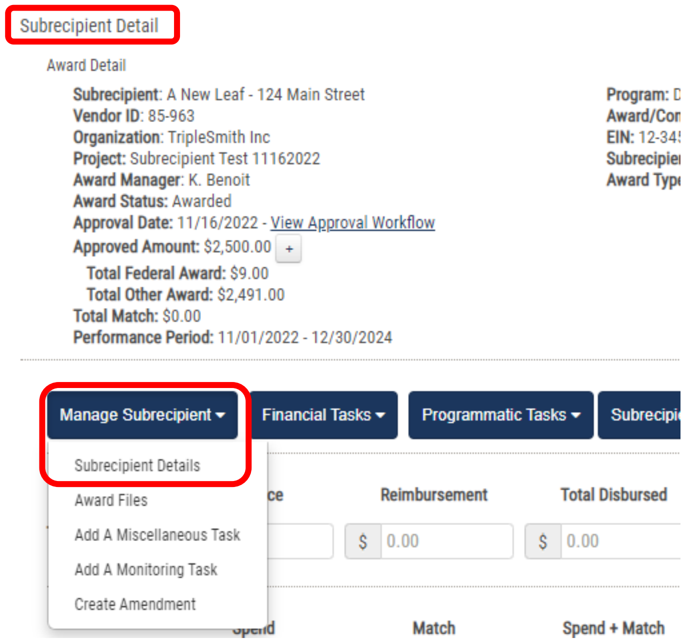
Showing 1 to 1 of 1 entries

Previous 1 Next

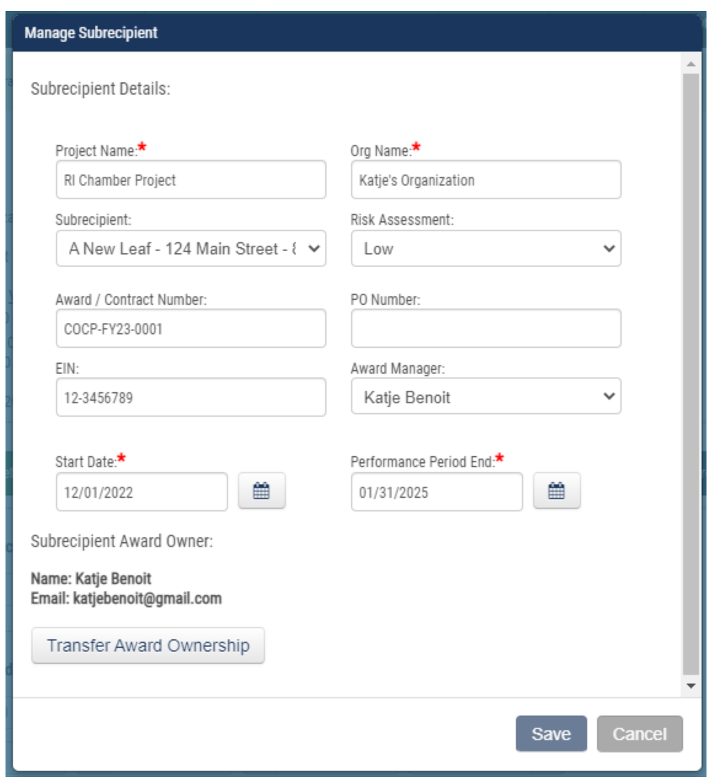
Reload

Manage Subrecipient Details

Subrecipient details can be viewed/edited in the post-award phase. From the *Subrecipient Detail* page, clicking on *Manage Subrecipient* and select *Subrecipient Details.*



A pop-up will open where you can view/edit information about the subrecipient.



Project Name: Title of the subrecipient's project, auto populated from the *Proposal Title* field on their application.

Org Name: Title of the subrecipient's organization, auto populated from the *Entity Legal Name* field on their application.

Subrecipient: The subrecipient's vendor information should be selected here. If the vendor was not selected during the awarding process, select your subrecipient's information from the drop-down options. If you do not see your subrecipient's organization in the list, send the RIFANS vendor number, name, and address to the GMO to have them added. GMO is only able to add entities on the RIFANS vendor list. If the entity is not a RIFANS vendor, they need to register in Ocean State Procures (OSP). A subrecipient selection is required and helps the connection between eCivis and RIFANS. **If the subrecipient field is left blank, invoices submitted by the subrecipient and approved in GMS will fail when sent to RIFANS for payment.**

Risk Assessment: Risk level of the subrecipient based on your agency's assessment. This selection is made during the awarding process and can be updated.

Award / Contract Number: The award number assigned to this subrecipient/project. This should match the Subaward Number on their respective subaward agreement. **If the Award / Contract Number field is left blank, invoices submitted by the subrecipient and approved in GMS will fail when sent to RIFANS for payment.**

PO Number: This field is repurposed for Cost Center and Project Code, if applicable. Otherwise, leave this field blank. **Do not** enter a Purchase Order number. If applicable, use the format below:

- Cost Center only: Enter Cost Center in RIFANS format (e.g. 72:102200104)
- Project Code only: Enter a dash before the Project Code with no spaces (e.g. -310AA)
- Both: Enter Cost Center, dash, Project Code with no spaces (e.g. 72:102200104-310AA)

EIN: EIN of the subrecipient.

Award Manager: The person from your agency who will be the point of contact for this subrecipient. This selection does not impact the approval workflows set up in the Approval tab of your solicitation.

Start Date: The start date of the subrecipient's performance period. This information should match the performance period start date on their respective subaward agreement.

Performance Period End: The end date of the subrecipient's performance period. This information should match the performance period end date on their respective subaward agreement.

Subrecipient Award Owner: Name of the subrecipient user that is listed as *Owner* for this award. For more information on Subrecipient Award Owners and how to transfer ownership, refer to the Transferring Subrecipient Award Ownership section of this document.

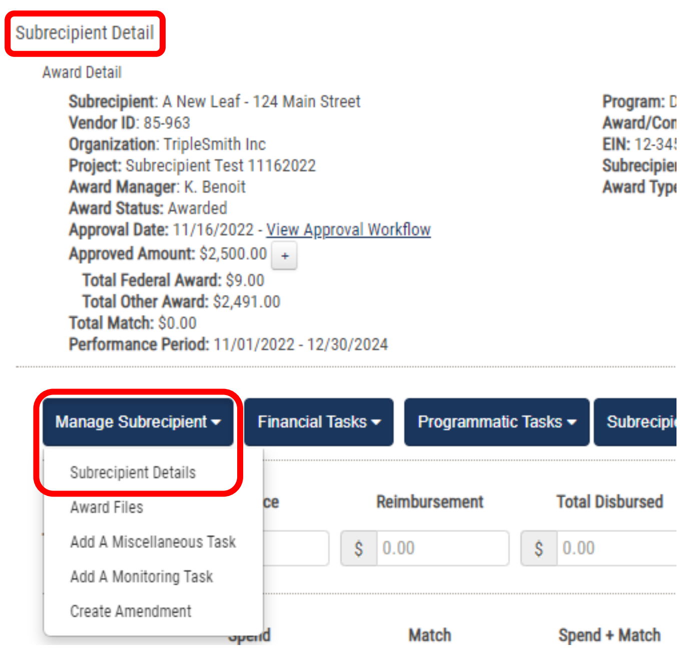
Note: Post-award changes to the *Performance Period End* date should be done through the Grant Amendment functionality to ensure both parties receive notification and have a record of the changes.

Post-award changes to the *Manage Subrecipient* fields Project Name, Org Name, Award/Contract Number, and/or EIN by the grantor should be accompanied by an external Miscellaneous Task to notify the subrecipient.

Transferring Subrecipient Award Ownership

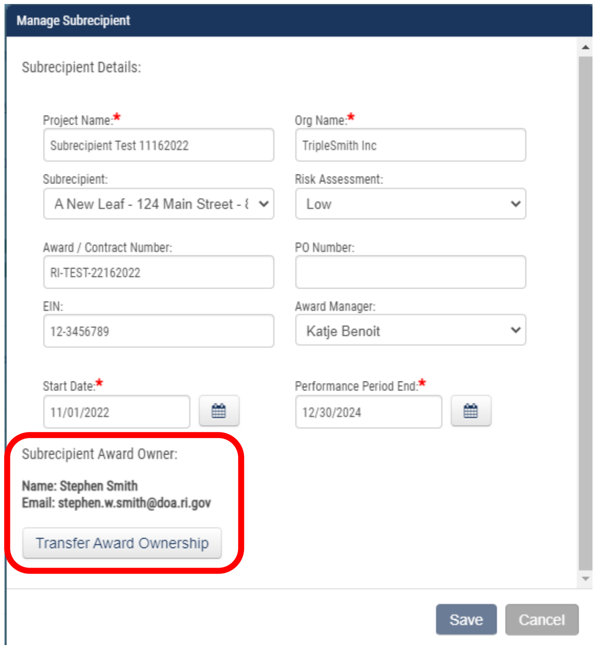
Subrecipient Award Owner is the user that submitted the application and accepted the award package. For Direct Awards, the Subrecipient Award Owner is the user that accepted the Direct Award Invite and accepted the award package. After an award is accepted, Subrecipient Award Owners can invite additional team members to join their award dashboard to help manage post-award activities. Team members can view, edit, and submit reports to the grantor agency, however, only Award Owners can add/invite additional team members. If needed, the grantor agency can transfer the *Award Owner* permissions to another user at the subrecipient's entity. An example is if the original *Award Owner* no longer works for the subrecipient entity, and the award needs to be transferred to someone else. Recommended: Upload a copy of the subrecipient's transfer request to Internal Award Files. Refer to the [Overview of the Subrecipient Detail Page](#) section of this document.

To initiate the transfer, navigate to the appropriate subrecipient's *Subrecipient Detail* page. Click on *Manage Subrecipient* then select *Subrecipient Details*:

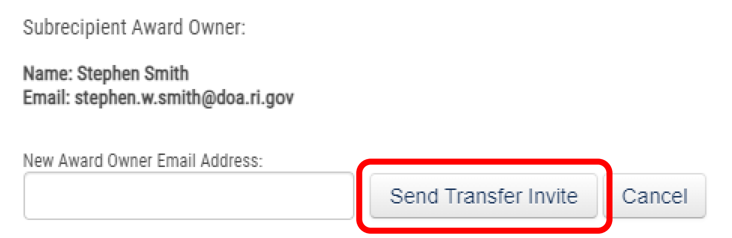


DEPARTMENT OF ADMINISTRATION

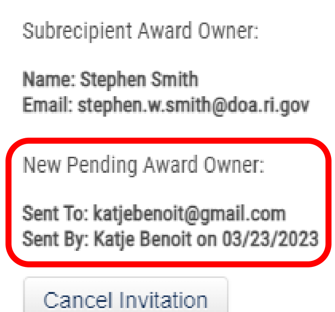
The *Mange Subrecipient* pop up will appear where you can view who is the current *Subrecipient Award Owner*. To initiate a transfer of award ownership, click *Transfer Award Ownership*



Enter the email address of the user you wish to transfer award ownership to. Click *Send Transfer Invite.*



The *New Pending Award Owner* will show with the state agency user who initiated the transfer and the date. If needed, click *Cancel Invitation*.



Once the user accepts the invite, the *Subrecipient Award Owner* will update.

Subrecipient Award Owner:

Name: Katje Benoit
Email: katjebenoit@gmail.com

Transfer Award Ownership

The Award Manager will also be notified via email that the subrecipient accepted the award ownership transfer invite:

Katje Benoit has accepted the award ownership transfer for the award below.

- Subrecipient Test 11162022
- RI-TEST-22162022

Please contact support@ecivis.com for technical issues or questions.

Sincerely,
Test

Managing Approval Workflows

Approval workflows are set up for the different post-award tasks during solicitation set up. Approval workflows can be edited throughout the lifecycle of a subrecipient grant program. If you need to edit an approval workflow, reference the Grantor Approval Workflow user guide, and/or the training video Approval Tab of the Solicitation.

Once a task has been submitted by a subrecipient, agency users can view the approval workflow and which agency users queue the task is currently in. To view a workflow and its current status, navigate to the *Subrecipient Detail* page and locate the task. Click on the hyperlinked *Current Status* to view the approval workflow, including who has already approved the task and who needs to.

Amendment Date	Current Status	Actions
03/03/2023	Pending Approval	View Amendment

This will open the approval workflow, the status of each approver, the date and time an approver responded to the task, and any comments they may have left.

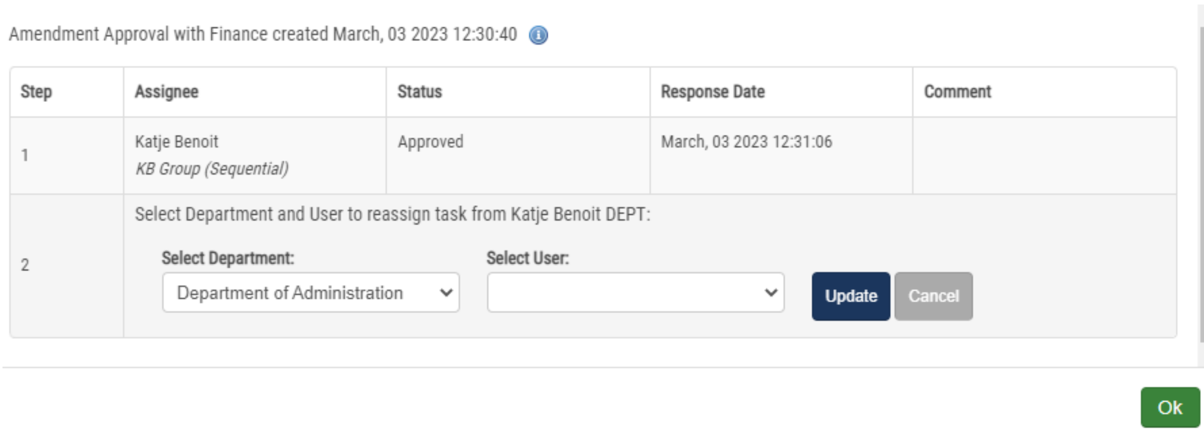
Amendment Approval with Finance created March, 03 2023 12:30:40

Step	Assignee	Status	Response Date	Comment
1	Katje Benoit *KB Group (Sequential)*	Approved	March, 03 2023 12:31:06	
2	Katje Benoit DEPT *KB Group (Sequential)*	Active		

Ok

If a user in an approval workflow is out of the office, a user with the Department Master Account Holder (DMAH) role can reassign the task as a one-time action. Click on the hyperlinked name of the Assignee you wish to re-assign.

This will allow you to choose and reassign the task to a new user. Once complete, click *Update* and *Ok.*



Note: this only re-assigns the approver for this specific task. If you need to edit an approval workflow to add/remove users for future tasks, the change will need to be made in the *Approval* tab of your solicitation.

Reviewing and Approving a Financial Report (Payment Request)

When a subrecipient submits a Financial Report (which will be used for payment requests), the user(s) in the Financial Report Approval Workflow will be notified via email that they have a pending task to review. For more information on setting up and editing approval workflows, reference the [Grantor Approval Workflow] user guide, and/or the training video [Approval Tab of the Solicitation]. An example of the automatic email sent to Financial Report Approval Workflow members is below:


eCivis

An approval task has been created that requires your attention in eCivis Grants Network.

Program:	Chamber of Commerce Program
Project:	Competitive Award Acceptance
Award/Contract Number:	COCP-FY23-0001
Subrecipient:	Katje's Organization
Task Type:	Financial Report Approval
Approval Type:	Single User
Review Comment:	

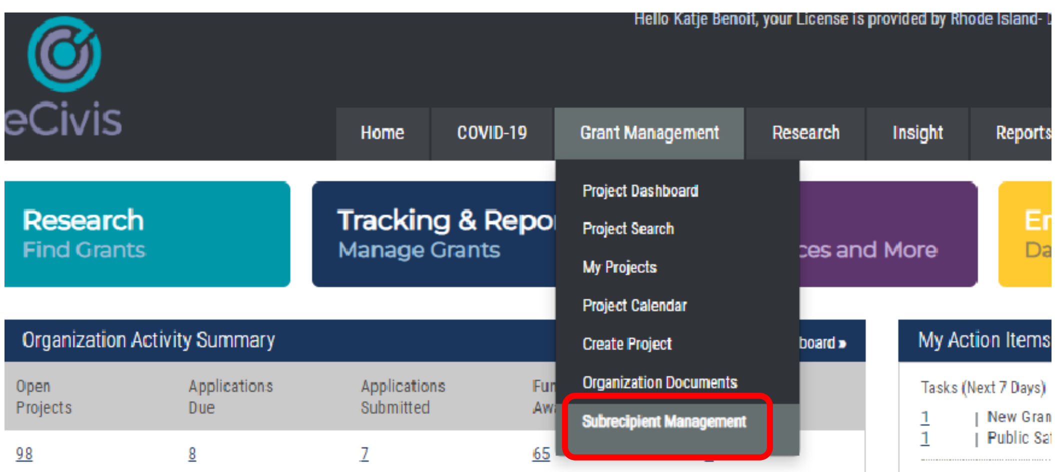
Sincerely,

The eCivis Support Team

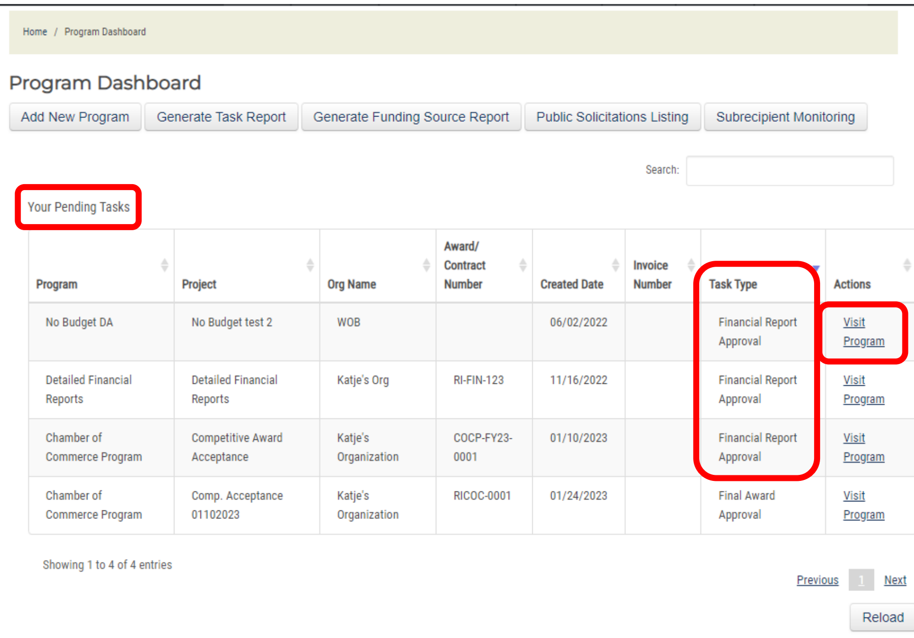
support@ecivis.com

(877) 232-4847, option 2, 8am-5pm PT

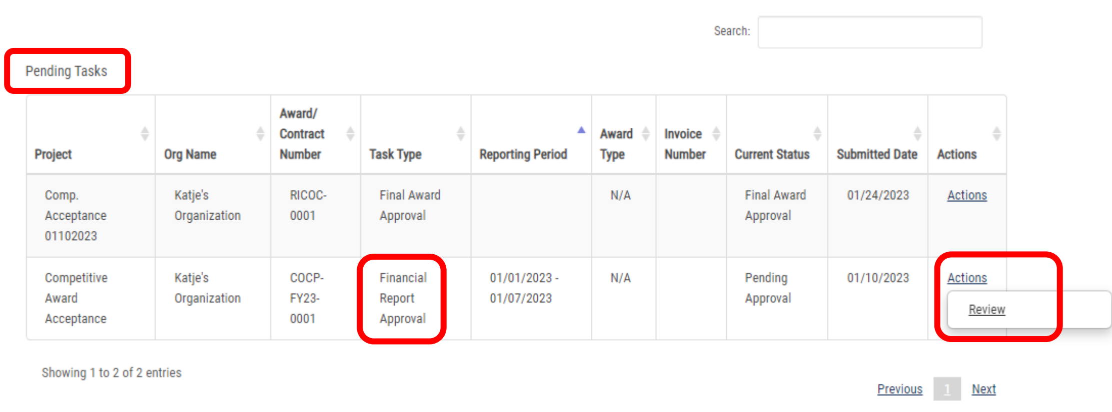
Members of the approval group can also see all pending tasks by navigating to the Subrecipient Management module of eCivis. To do so, hover over the *Grant Management* tab and select *Subrecipient Management*



This will open the Grantor Program Dashboard. At the top of the page, the user will see all of their pending tasks. To review and approve a Financial Report, locate the task and click *Visit Program*



This will open the Program Detail page. From the Program Detail page, an approver can scroll to their Pending Tasks table, click *Actions* and then *Review*



DEPARTMENT OF ADMINISTRATION

This will open the Financial Report for an approver to review. At the top of the page is the *Subrecipient Detail* information. This is summary information about the subrecipient's award.

Subrecipient Detail

Award Detail

Subrecipient: A New Leaf - 124 Main Street
Vendor ID: 85-963
Organization: Katje's Organization
Project: Competitive Award Acceptance
Award Manager: K. Benoit
Award Status: Awarded
Approval Date: 12/12/2022
Approved Amount: $900.00 +
Total Federal Award: $450.00
Total Other Award: $450.00
Total Match: $0.00
Performance Period: 12/01/2022 - 12/31/2024

Program: Chamber of Commerce Program
Award/Contract Number: COCP-FY23-0001
EIN: 12-3456789
Subrecipient Risk: Low
Award Type: N/A

Scrolling down, in the *Financial Report Details* section, the reporting period and the amount requested from each budget category will be shown for that invoice. Refer to the [GMS Training – Subaward Invoice Approvals-20230509] recording and slides for details on invoice review.

Financial Report Details

Reporting Period: 01/01/2023 - 01/07/2023

Invoice number: 8.25.2022-001

Receiver ID: 654130

Category	Spend	Match	Award Approved	Match Approved	Award Remaining	Match Remaining	Total Remaining
1. PERSONNEL	$ 400.00	$ 0.00	$ 500.00	$ 0.00	$ 500.00	$ 0.00	$ 500.00
2. FRINGE BENEFITS	$ 100.00	$ 0.00	$ 300.00	$ 0.00	$ 300.00	$ 0.00	$ 300.00
3. TRAVEL	$ 0.00	$ 0.00	$ 100.00	$ 0.00	$ 100.00	$ 0.00	$ 100.00
4. EQUIPMENT	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
5. SUPPLIES	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
6. CONTRACTUAL	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
7. CONSULTANT PROFESSIONAL SERVICES	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
8. SUBAWARDS	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
9. CONSTRUCTION	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
10. OTHER	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
11. INDIRECT COSTS	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00

Report Total	Spend	Match	Total Award Approved	Total Match Approved	Total Award Remaining	Total Match Remaining	Total Remaining
	$ 500.00	$ 0.00	$ 900.00	$ 0.00	$ 900.00	$ 0.00	$ 900.00
	100.00 %	0.00 %		0.00 %	100.00 %	0.00 %	100.00 %

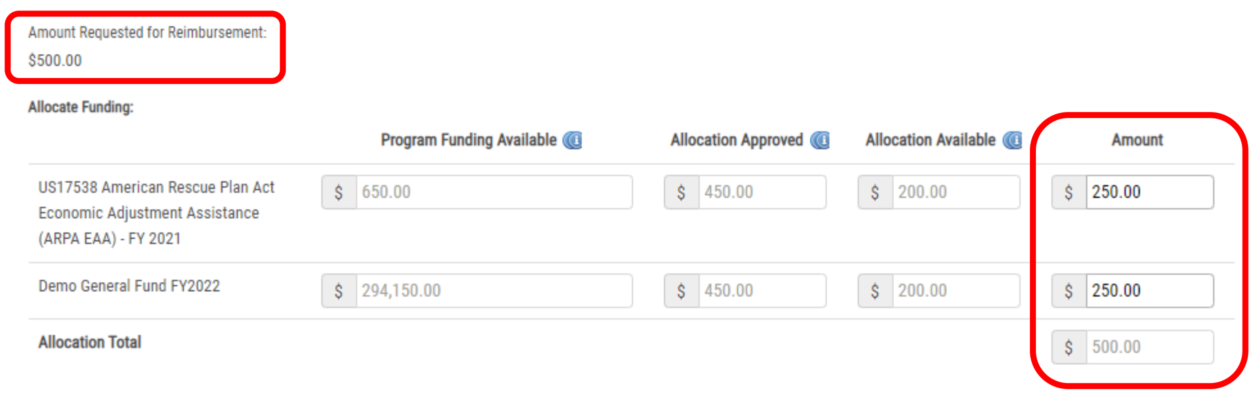
Amount Requested for Reimbursement:
$500.00

Before an invoice is approved, a state agency approver needs to input the Invoice Number and Receiver ID fields.

> **Invoice Number:** A unique invoice number needs to be inputted by agency staff before it is approved and sent to RIFANS. Invoice approval will stop at RIFANS if the GMS invoice number field is left blank, if the invoice number is not unique to the subrecipient, or if there are additional spaces inputted after the invoice number. An example of a unique invoice number could be Grant Agreement number-date approved (e.g., DOA-22-0001-06012022)
>
> **Receiver ID:** In this field, enter the applicable RIFANS Natural Account code. If left blank, it will default in RIFANS to Natural Account 654130, which is the subaward natural.

Review the dollar amounts requested by the subrecipient in each budget category. The total amount requested will also appear in the "Amount Requested for Reimbursement" field. Ensure that the *Total Spend* field and the *Amount Requested for Reimbursement* field are the same.

Below the detailed budget is the Allocation section. In this section, allocate how much funding from each funding source (if more than one) should be used to pay this invoice. The *Allocation Total* needs to be the same amount as the *Amount Requested for Reimbursement.* If the amounts are different, the system will not let you approve and move the Financial Report (Payment Request) to the next stage.



The next section of the report is to review the narrative and any files that have been submitted as backup documentation along with the subrecipients request. You can click on the hyperlinked "File Name" or click the download icon to download and view the documentation submitted by the subrecipient:

Financial Report Narrative:

This request is for $500 to cover the Personnel and Fringe Benefits costs of Program Manager II.

Financial Report Files:

Search:

File Name	File Size	Created On	Actions
Additional Backup Documentation.docx	11.7 Kb	01/25/2023	
Invoice.docx	11.7 Kb	01/25/2023	

Showing 1 to 2 of 2 entries

Previous 1 Next

The next section of the report allows the state agency to attach any files necessary to the Financial Report before approving. Files uploaded in the *Financial Report Files – External* section will be visible to the subrecipient, and files uploaded in the *Financial Report Files – Internal* section will not be visible/provided to the subrecipient but kept on record for agency viewing/reference.

Financial Report Files - External:
Please upload any files necessary to finalize your financial report approval.
These files will be provided to the subrecipient.

Attach Files

Search:

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

Showing 0 to 0 of 0 entries

Previous Next

Financial Report Files - Internal:
Please upload any files necessary to finalize your financial report approval.
These files will be NOT be provided to the subrecipient.

Attach Files

Search:

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

Showing 0 to 0 of 0 entries

Previous Next

Once everything in the submitted Financial Report (Payment Request) has been reviewed, different actions can be taken:

Save | Approve | Return to First Approver | Return to Subrecipient | Reject

Save: This will save any changes that have been made to the report while approving. Saving the report allows you to close out of the page and come back to finish reviewing/approving at a later date.

Approve: This will approve the report. Before approving, make sure that the Invoice Number, Receiver ID, and Allocation Amount fields are completed. If you are part of a sequential approval workflow, the approved report will then be sent to the next approver to review. If you are the final user in the approval workflow, the approved report will be marked "Approved / Awaiting Payment." Financial Reports in the "Approved / Awaiting Payment" status will be sent to RIFANS that night where the invoice will be created and enter your agency's existing approval workflow for that line sequence.

Return to First Approver: This button will only appear if the Financial Report Approval workflow is sequential. Use this button if you need a previous approver to modify the report, and the subrecipient does not need to make any changes. You will be required to enter in a note explaining what modifications are being requested of the first approver.

Return to Subrecipient: If you need the subrecipient to make changes to the report (edit the amounts requested, attach additional back up documentation, edit their narrative, etc.) then use the Return to Subrecipient button. This will return the Financial Report back to the subrecipient where they can edit the report before resubmitting to you. Once they resubmit, the report will re-enter the Financial Report approval workflow.

Reject: This will reject the report completely. The subrecipient will receive an automatic email that their report has been rejected and if they need to re-submit they will need to start over. If edits are needed for a report, use the Return to Subrecipient button and not the Reject button.

Once all approvers in the Financial Report Approval workflow have approved a Financial Report (Payment Request), the report will move to the status "Approved / Awaiting Payment." The subrecipient will also receive an email notifying them that their Financial Report has been approved. In their eCivis Portal, they will see the "Approved / Awaiting Payment" status as well.

Award Activity

Show 10 entries

Search:

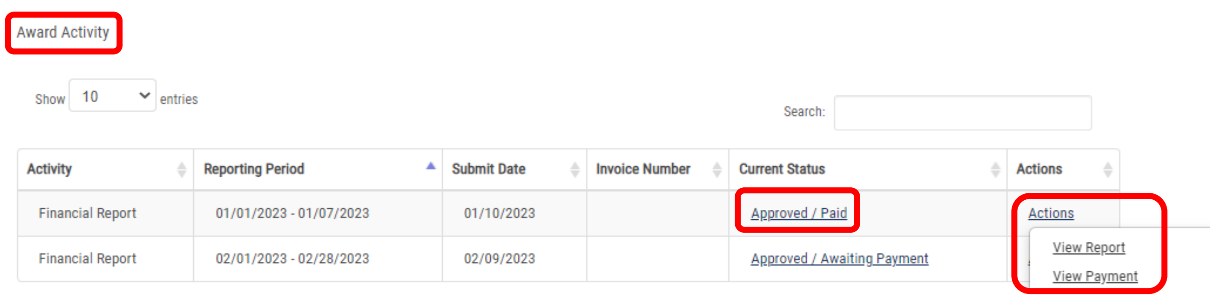
Activity	Reporting Period	Submit Date	Invoice Number	Current Status	Actions
Financial Report	02/01/2023 - 02/28/2023	02/09/2023		Approved / Awaiting Payment	Actions

Financial Reports in the "Approved / Awaiting Payment" status will be sent to RIFANS that night where the invoice will be created and enter your agencies existing approval workflow for that line sequence.

If any required fields are missing in eCivis, and the invoice cannot be created in RIFANS, the GMO will reach out to the Award Manager with instructions on changes that need to be made for the invoice to move forward.

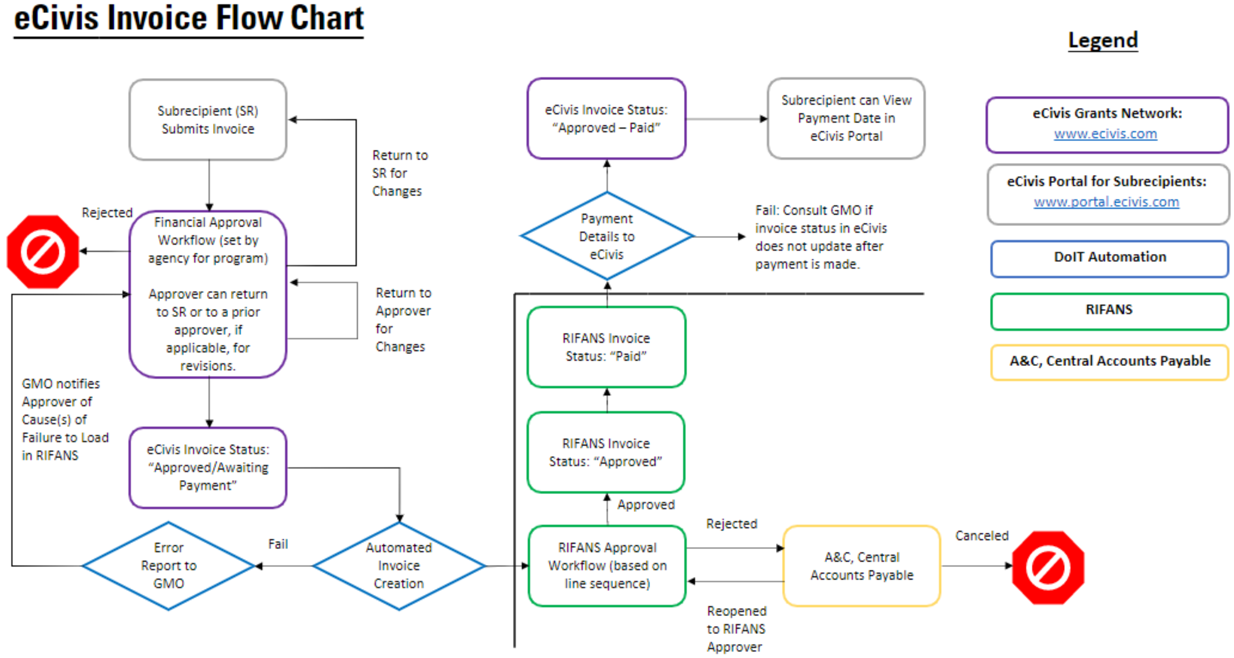
If there is someone in the RIFANS approval workflow that is not part of the GMS approval workflow, that needs to see the submitted invoice in eCivis or the backup documentation, then they will need to be added to eCivis with the user role "RIFANS Approver." All new user requests should be submitted through the GMS Support Form. Instructions for RIFANS Approvers to navigate to an approved invoice in eCivis can be found by hovering over the *Grant Management* tab and selecting *Organization Documents.* Reference the document titled "RIFANS Users – Reviewing Invoices & Backup Documentation in eCivis."

Once an invoice has been approved in both eCivis and RIFANS, it will be paid. Payment information will be automatically sent from RIFANS to eCivis and the subrecipient Financial Report will move to the status "Approved / Paid." To access a copy of the report, click on *Actions* then *View Report* to open a view-only version of the approved report. To view payment information, click on *Actions* then *View Payment.*



DEPARTMENT OF ADMINISTRATION

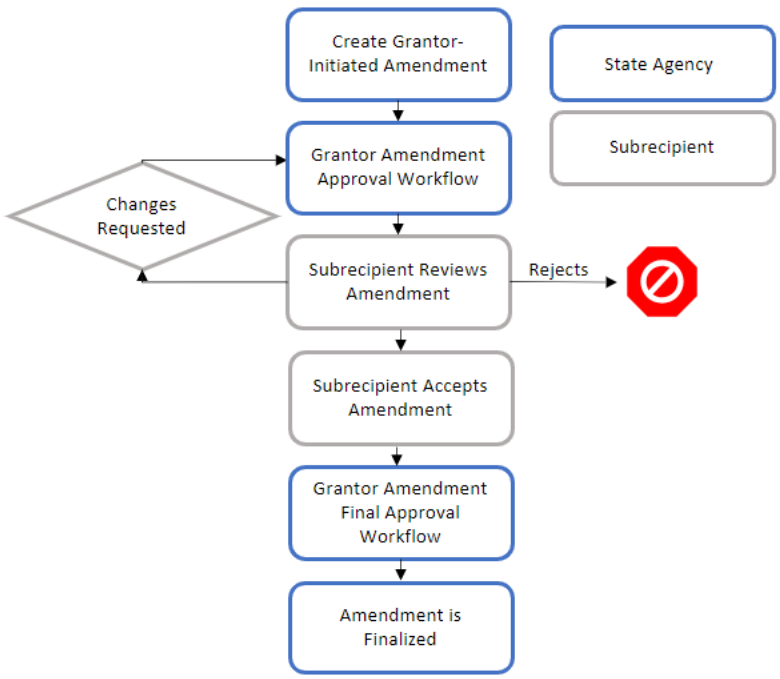
eCivis Invoice Flow Chart



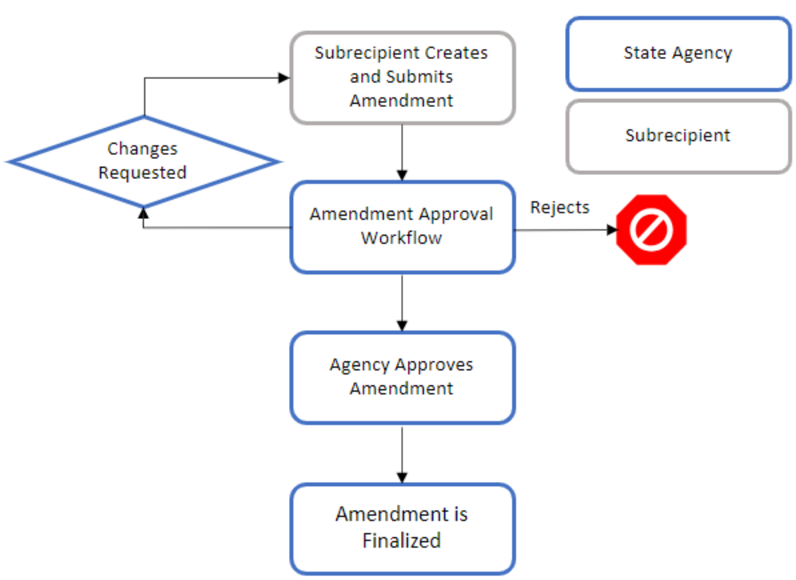
Grant Amendments

Grant amendments can be initiated by the grantor agency or by the subrecipient. Amendments can only be initiated if there are no Financial Reports (Payment Requests) or Grant Amendments in the *Draft* or *Pending Approval* status.

Grantor Initiated Amendment Workflow:



Subrecipient Initiated Amendment Workflow:



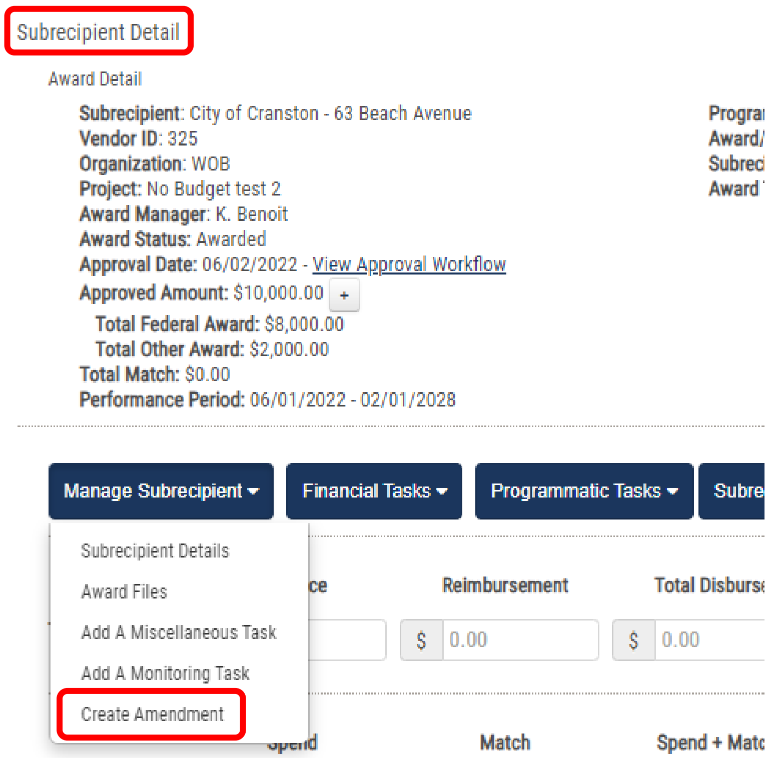
Grantor Initiated Amendments

The grantor agency can initiate a Grant Amendment to amend a subrecipient's award. Grant Amendments can be initiated by the grantor agency to make changes to the following:

- Performance Period End Date
- Any change to the budget
- Target Units for Goals and Subgoals

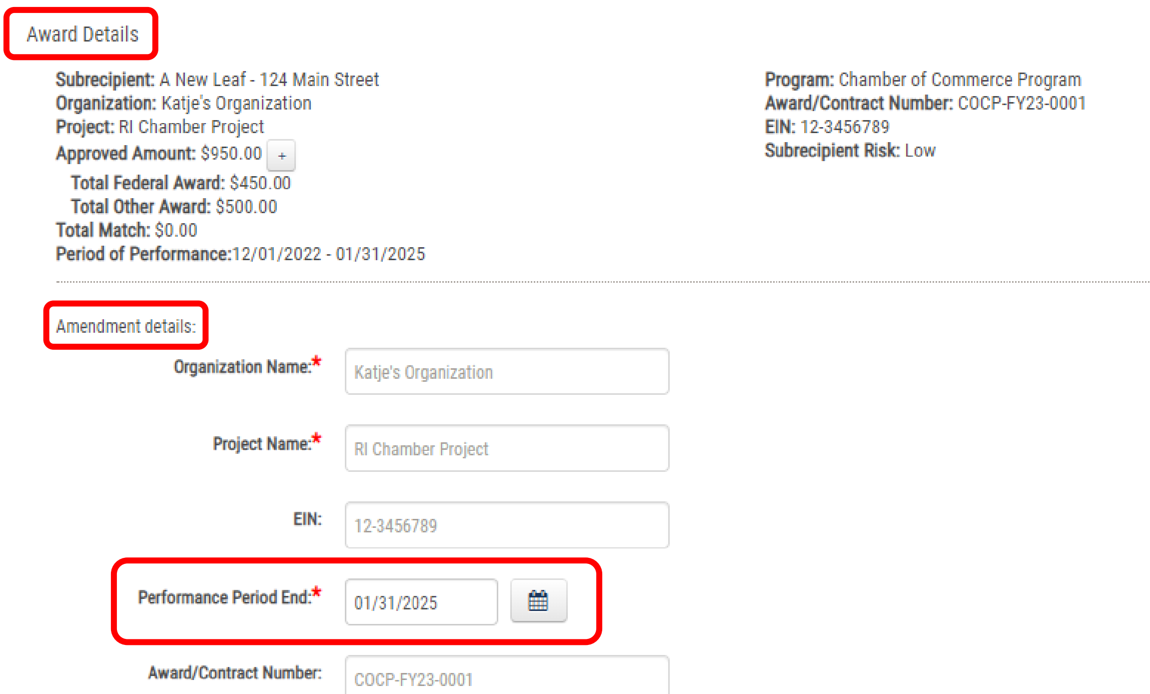
Creating a Grant Amendment

To initiate an Amendment, navigate to the *Subrecipient Detail* page of the appropriate subrecipient. From the action buttons, select *Create Amendment*.

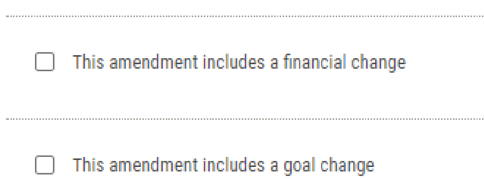


Note: The *Create Amendment* option will not appear on the *Subrecipient Detail* page if there are any Financial Reports (Payment Requests) or Grant Amendments in the *Draft* or *Pending Approval* status.

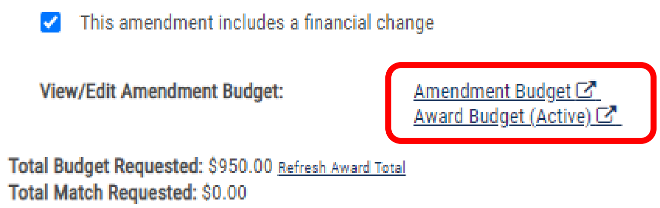
This will open the Amendment. At the top of the page will be summary award details about the subrecipient. In the *Amendment Details* section, a change to the subrecipient's *Performance Period End* date can be made. Changes to the subrecipient's *Organization Name, Project Name, and/or EIN* can be made by clicking the *Manage Subrecipient* button on the *Subrecipient Detail* page, or through a subrecipient initiated Grant Amendment. Changes to *Award/Contract Number* can only be made by clicking the *Manage Subrecipient* button the *Subrecipient Detail* page. The agency is solely responsible for notifying the subrecipient via an external Miscellaneous Task of any changes made using the *Manage Subrecipient* button.



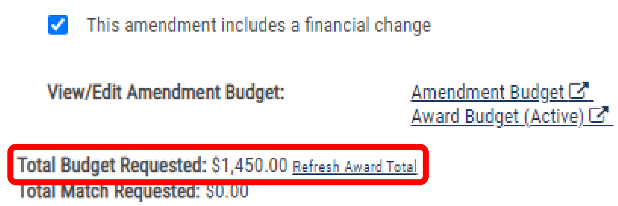
Next, you have the option to select if this Amendment includes a financial change and/or a goal change.



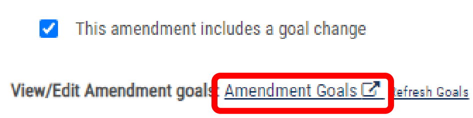
If a change to the subrecipient's budget is needed, check the box "This amendment includes a financial change." A link to open their Award Budget (Active) will appear where you can reference their current award amount and breakdown by budget categories. The *Award Budget (Active)* is a view-only copy where no edits can be made. To make edits to the subrecipient's budget, click the hyperlinked *Amendment Budget.*



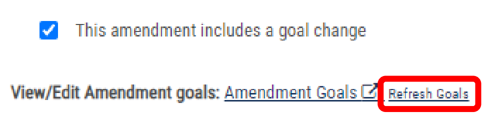
The subrecipient's amendment budget will open in a new tab for you to edit. For detailed instructions on how to edit a subrecipient budget, reference the RI Specific – How to Submit an Application guide. Once you have made and saved the necessary changes to the subrecipient's budget, close out of the budget tab and click *Refresh Award Total.* Confirm that the amended total is showing.



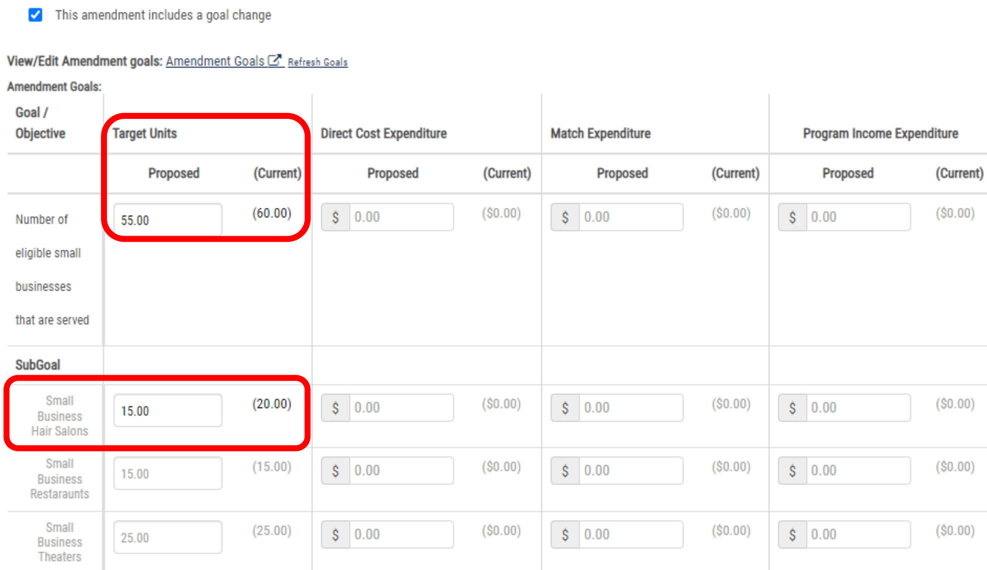
If a change to the subrecipient's goals is needed, check the box "This amendment includes a goal change." To make edits to the subrecipient's goals, click the hyperlinked *Amendment Goals.*



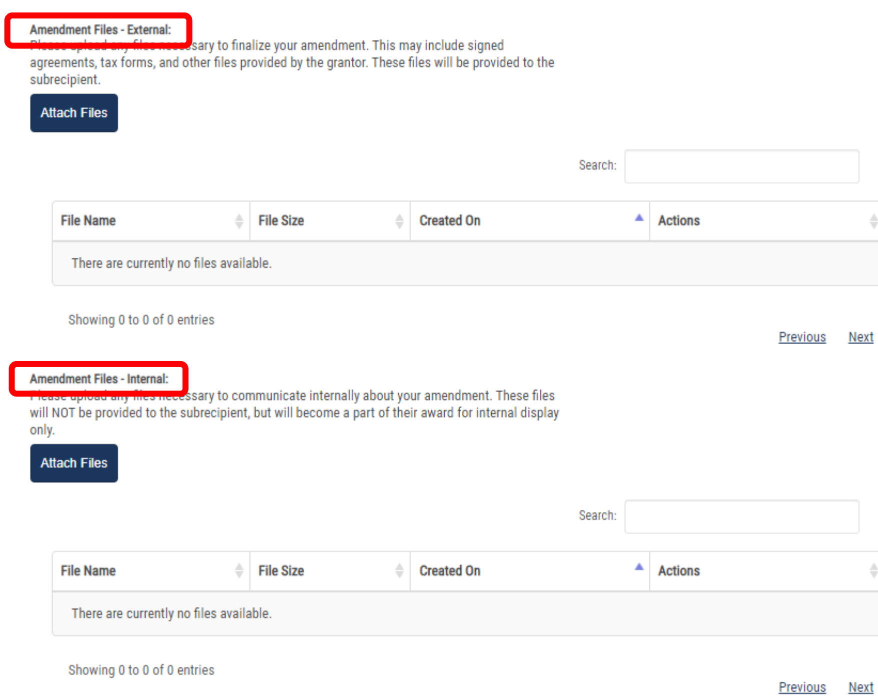
The subrecipient's goals will open in a new tab for you to edit. Edit the *Target Units* for the appropriate Goals and Subgoals before clicking *Save.* Once you have made and saved the necessary changes to the subrecipient's goals, close out of the Amendment Goals tab and click *Refresh Goals.*



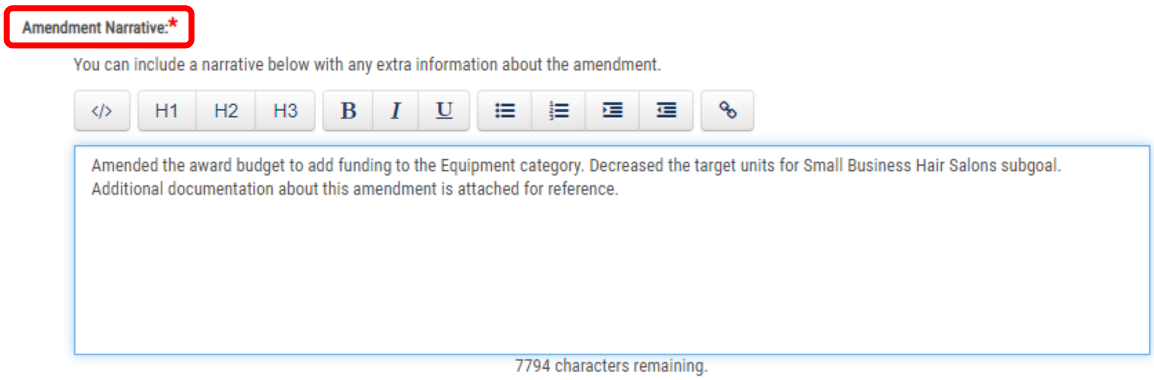
Clicking *Refresh Goals* will load the *Amendment Goals* table where you can view their current vs. proposed *Target Units.* Fields that are greyed out indicate that no changes were made.



The next section allows you to upload files relevant to the Amendment. *Amendment Files – External* will be visible to the subrecipient and *Amendment Files – Internal* will not be visible to the subrecipient and used for internal use only. Highly recommended: Complete and upload the Subaward Amendment Template to amendments created in eCivis. Until eCivis functionality for viewing past amendments improves, both parties will benefit from attached Subaward Amendments.



The final section is the *Amendment Narrative.* Include a description about the amendment and what is being adjusted. This will be available to the subrecipient to review.



Once all sections of the Amendment are complete, various actions can be taken:

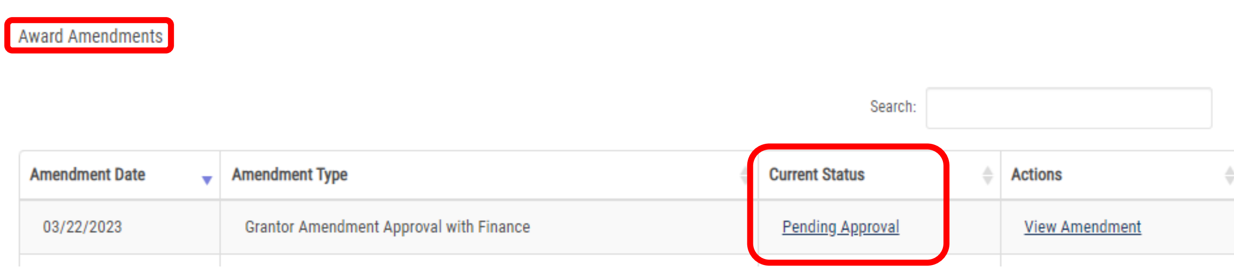
Save Amendment: This will save the Amendment and all changes that have been made. You will be able to close out of the page and come back at a later date to finish and Send for Approval. Note: While Amendments are in *Draft* status, the subrecipient cannot initiate a Financial Report (Payment Request).

Send for Approval: This will send the created Amendment to the appropriate Approval Workflow set up in your solicitation. Depending on the changes in the Amendment, it will either enter the *Grantor Amendment Approval* workflow or the *Grantor Amendment Approval With Finance* workflow. If you need to edit an approval workflow, reference the Grantor Approval Workflow user guide, and/or the training video Approval Tab of the Solicitation. Once the Amendment goes through the appropriate workflow, and is approved, it will be sent to the subrecipient to review and accept.

Cancel: This will close out of the page and your changes will not be saved.

Delete: This will permanently delete the drafted Amendment. If deleted, you will need to start over from the beginning to initiate a new Amendment.

Once sent for approval, the Amendment *Current Status* will update from *Draft* to *Pending Approval*:



Reviewing and Approving a Grantor Initiated Amendment

Depending on the type of Grant Amendment, the submitted request will enter an approval workflow:

> **Grantor Amendment Approval** – Amendments initiated by the grantor agency that do not change the subrecipient's budget/award amount will enter this workflow.
>
> **Grantor Amendment Approval with Finance** – Amendments initiated by the grantor agency that do change the subrecipient's budget/award amount will enter this workflow.

When a program manager initiates a Grant Amendment for a subrecipient, the user(s) in the appropriate workflow will be notified via email that they have a pending task to review. For more information on setting up and editing approval workflows, reference the Grantor Approval Workflow user guide, and/or the training video Approval Tab of the Solicitation. An example of the automatic email sent to Grantor Amendment Approval Workflow members is below:

eCivis

An approval task has been created that requires your attention in eCivis Grants Network.

Program:	Chamber of Commerce Program
Project:	RI Chamber Project
Award/Contract Number:	COCP-FY23-0001
Subrecipient:	Katje's Organization
Task Type:	Grantor Amendment Approval
Approval Type:	Single User
Review Comment:	

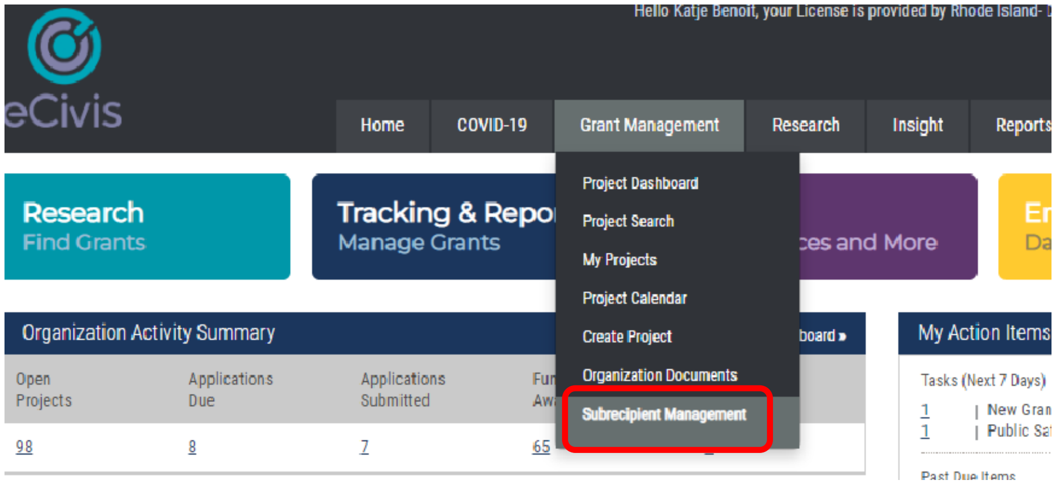
Sincerely,

The eCivis Support Team

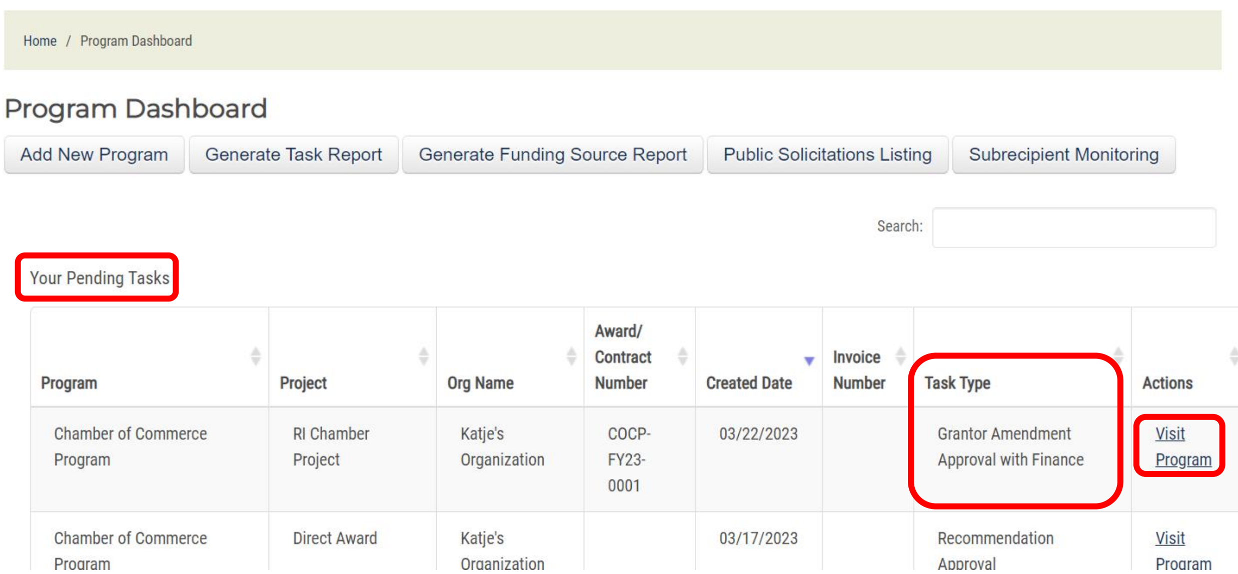
support@ecivis.com

(877) 232-4847, option 2, 8am-5pm PT

Members of the approval group can also see all pending tasks by navigating to the Subrecipient Management module of eCivis. To do so, hover over the *Grant Management* tab and select *Subrecipient Management*



This will open the Grantor Program Dashboard. At the top of the page, the user will see all of their pending tasks. To review and approve a Grantor Amendment, locate the task and click *Visit Program*



This will open the Program Detail page. From the Program Detail page, an approver can scroll to their Pending Tasks table, click *Actions* and then *Review*

Pending Tasks

Project	Org Name	Award/ Contract Number	Task Type	Reporting Period	Award Type	Invoice Number	Current Status	Submitted Date	Actions
RI Chamber Project	Katje's Organization	COCP-FY23-0001	Grantor Amendment Approval with Finance		N/A		Pending Approval	03/22/2023	Actions Review

This will open Grantor Amendment for an approver to review. At the top of each Amendment is the *Award Detail* section that provides summary information about this subrecipient.

Subrecipient Detail

Award Detail

Subrecipient: A New Leaf - 124 Main Street
Vendor ID: 85-963
Organization: Katje's Organization
Project: RI Chamber Project
Award Manager: K. Benoit
Award Status: Awarded
Approval Date: 12/12/2022
Approved Amount: $950.00 +
Total Federal Award: $450.00
Total Other Award: $500.00
Total Match: $0.00
Performance Period: 12/01/2022 - 01/31/2025

Program: Chamber of Commerce Program
Award/Contract Number: COCP-FY23-0001
EIN: 12-3456789
Subrecipient Risk: Low
Award Type: N/A

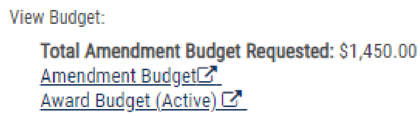
The next section is the *Award Details*. Review the *Proposed* and the *Current* columns for what, if anything, has been amended.

Amendment Details

Award details:

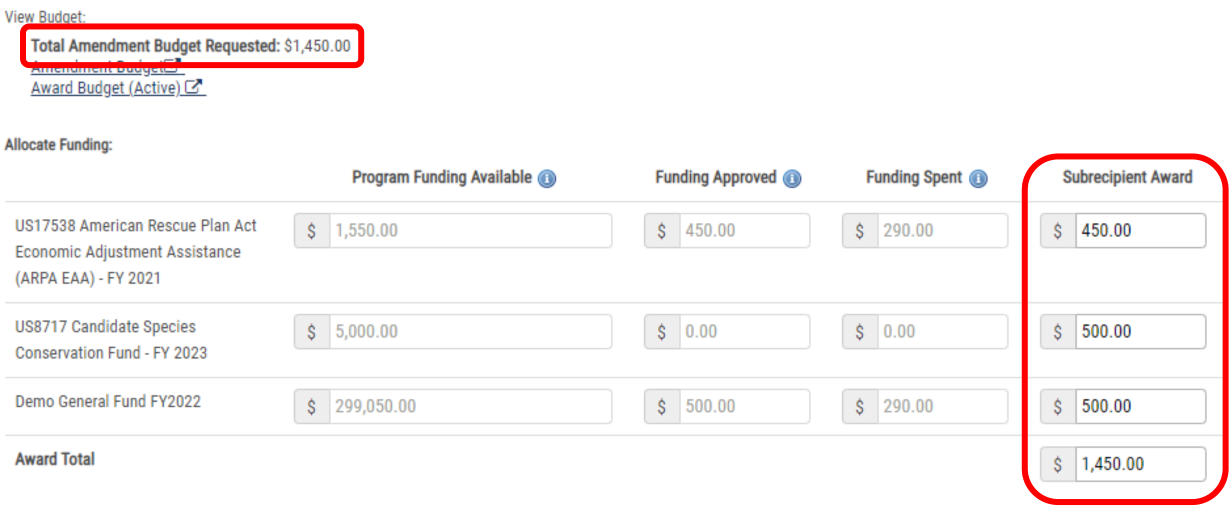
	Proposed	Current
Organization Name:*	Katje's Organization	(Katje's Organization)
Project Name:*	RI Chamber Project	(RI Chamber Project)
EIN:	12-3456789	(12-3456789)
Performance Period End:*	01/31/2025	(01/31/2025)
Award/Contract Number:	COCP-FY23-0001	(COCP-FY23-0001)

If a financial change was made, hyperlinks to the *Award Budget (Active)* and the *Amendment Budget* will be available. Use the hyperlinks to view both versions and review the changes to the budget that have been made.


View Budget:

Total Amendment Budget Requested: $1,450.00
Amendment Budget
Award Budget (Active)

To accept the budget changes, update the *Allocate Funding* section so the *Award Total* and the *Total Amendment Budget Requested* amounts match.


View Budget:

Total Amendment Budget Requested: $1,450.00
Amendment Budget
Award Budget (Active)

Allocate Funding:

	Program Funding Available	Funding Approved	Funding Spent	Subrecipient Award
US17538 American Rescue Plan Act Economic Adjustment Assistance (ARPA EAA) - FY 2021	$ 1,550.00	$ 450.00	$ 290.00	$ 450.00
US8717 Candidate Species Conservation Fund - FY 2023	$ 5,000.00	$ 0.00	$ 0.00	$ 500.00
Demo General Fund FY2022	$ 299,050.00	$ 500.00	$ 290.00	$ 500.00
Award Total				$ 1,450.00

If you do not accept the budget changes or need the program manager to edit the request and resubmit, scroll to the bottom of the page to Return to Task Owner or Reject.

The next section is the *Amendment Goals*. Note: this section will only appear if you set up Goals and Subgoals for the subrecipient grant program. Compare the Proposed vs. Current columns to view the changes proposed by the program manager. Fields that are greyed out mean no changes were proposed.

Amendment Goals:

Goal / Objective	Target Units		Direct Cost Expenditure		Match Expenditure		Program Income Expenditure	
	Proposed	(Current)	Proposed	(Current)	Proposed	(Current)	Proposed	(Current)
Number of eligible small businesses that are served	55.00	(60.00)	$ 0.00	($0.00)	$ 0.00	($0.00)	$ 0.00	($0.00)
SubGoal								
Small Business Hair Salons	15.00	(20.00)	$ 0.00	($0.00)	$ 0.00	($0.00)	$ 0.00	($0.00)
Small Business Restaraunts	15.00	(15.00)	$ 0.00	($0.00)	$ 0.00	($0.00)	$ 0.00	($0.00)
Small Business Theaters	25.00	(25.00)	$ 0.00	($0.00)	$ 0.00	($0.00)	$ 0.00	($0.00)

The next section is the *Amendment Files*. Any files that were uploaded by the program manager when creating this Grant Amendment will be listed here. Additional files can be added to each section before approving. *Amendment Files – External* will be visible to the subrecipient and files loaded to the *Amendment Files – Internal* will be kept for reference with this Grant Amendment request, but not visible to the subrecipient.

Amendment Files - External:

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

Attach Files

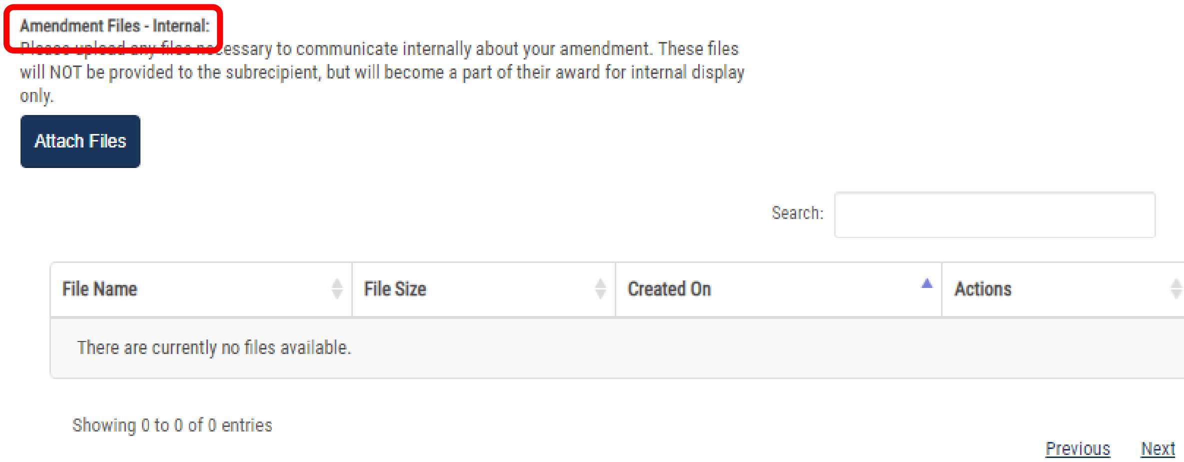
Search:

File Name	File Size	Created On	Actions
Test File.docx	11.7 Kb	03/01/2023	

Showing 1 to 1 of 1 entries

Previous 1 Next

DEPARTMENT OF ADMINISTRATION


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

Attach Files

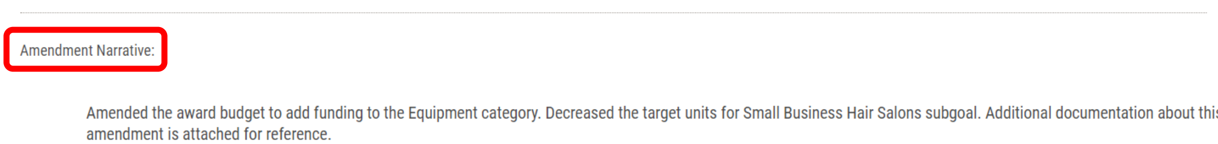
Search:

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

Showing 0 to 0 of 0 entries

Previous Next

The final section is the *Amendment Narrative* provided by the program manager that created the Amendment. Review this section for more information on what the proposed award changes are.



Once you have reviewed all information in the Grantor Amendment, different actions can be taken:

Approve: This will approve the proposed Grantor Amendment and send it to the subrecipient to review and accept. If you are part of a sequential approval workflow, the approved Amendment will then be sent to the next approver to review. If you are the final user in the approval workflow, approving the Amendment will move it to the status “Pending Subrecipient Acceptance” and the subrecipient will receive an email notifying them they have an Amendment to review and accept.

Return to First Approver: This button will only appear if the Amendment workflow is sequential. Use this button if you need a previous approver to review the Amendment again, and the Task Owner does not need to make any changes. You will be required to enter in a note explaining what modifications are being requested of the first approver.

Return to Task Owner: If you need the Task Owner (user who initiated the amendment) to make changes to the proposed Amendment (edit the budget modification, attach additional back up documentation, edit the narrative, etc.) then use the Return to Task Owner button. This will return the Amendment back to the Task Owner where they can edit it before resubmitting to you. Once they resubmit, the report will re-enter the Amendment Approval Workflow.

Reject: This will reject the Amendment completely. If edits are needed for an Amendment, use the Return to Task Owner button and not the Reject button.

Cancel: This will close out of the page and any changes will not be saved.

Once a Grantor Amendment has been approved, it will enter the *Current Status* of *Pending Subrecipient Acceptance*

Award Amendments

Search:

Amendment Date	Amendment Type	Current Status	Actions
03/22/2023	Grantor Amendment Approval with Finance	Pending Subrecipient Acceptance	View Amendment

If the subrecipient makes changes to the approved Amendment, users in the approval workflow will receive an email notification that changes have been requested.

eCivis

A grantor amendment was returned for requested changes by the subrecipient.

.Program Name: Chamber of Commerce Program
Organization Name: Katje's Organization
Award/Contract Number: COCP-FY23-0001
Status: Subrecipient Changes Requested

Note from subrecipient:

To see details, please visit the Program Dashboard [mandrillapp.com]

Please contact support@ecivis.com for technical issues or questions.

Sincerely,

Test

The status of the Grantor Amendment will also update to "Subrecipient Changes Requested." State agency users can then click *Edit Amendment* to view the subrecipients proposed changes and make any additional edits before sending it through the Grantor Amendment Approval workflow again.

Amendment Date	Amendment Type	Current Status	Actions
03/22/2023	Grantor Amendment Approval	Subrecipient Changes Requested	Edit Amendment

Final Approving a Grantor Initiated Amendment

When the subrecipient reviews and accepts the Grantor Amendment, the user(s) in the *Grantor Amendment Final Approval* workflow will be notified via email that they have a pending task to review. For more information on setting up and editing approval workflows, reference the Grantor Approval Workflow user guide, and/or the training video Approval Tab of the Solicitation. An example of the automatic email sent to Grantor Amendment Final Approval Workflow members is below:


eCivis

An approval task has been created that requires your attention in eCivis Grants Network.

Program:	Chamber of Commerce Program
Project:	RI Chamber Project
Award/Contract Number:	COCP-FY23-0001
Subrecipient:	Katje's Organization
Task Type:	Grantor Amendment Final Approval
Approval Type:	Sequential Group
Review Comment:	

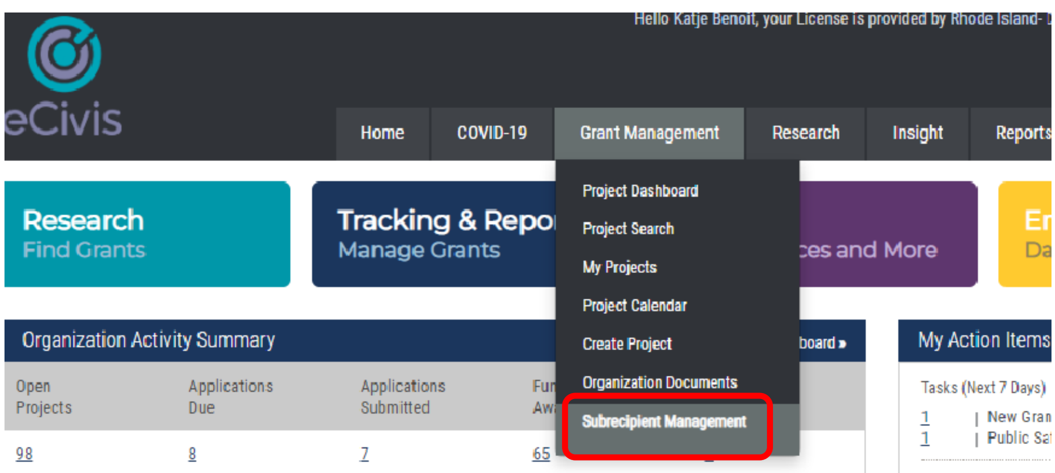
Sincerely,

The eCivis Support Team

support@ecivis.com

(877) 232-4847, option 2, 8am-5pm PT

Members of the approval group can also see all pending tasks by navigating to the Subrecipient Management module of eCivis. To do so, hover over the *Grant Management* tab and select *Subrecipient Management*



This will open the Grantor Program Dashboard. At the top of the page, the user will see all of their pending tasks. To final approve a Grantor Amendment, locate the task and click *Visit Program*.

Home / Program Dashboard

Program Dashboard

Add New Program | Generate Task Report | Generate Funding Source Report | Public Solicitations Listing | Subrecipient Monitoring

Search:

Your Pending Tasks

Program	Project	Org Name	Award/ Contract Number	Created Date	Invoice Number	Task Type	Actions
Chamber of Commerce Program	RI Chamber Project	Katje's Organization	COCP-FY23-0001	03/22/2023		Grantor Amendment Approval with Finance	Visit Program

This will open the Program Detail page. From the Program Detail page, an approver can scroll to their Pending Tasks table, click *Actions* and then *Review*.

Pending Tasks

Project	Org Name	Award/ Contract Number	Task Type	Reporting Period	Award Type	Invoice Number	Current Status	Submitted Date	Actions
RI Chamber Project	Katje's Organization	COCP-FY23-0001	Grantor Amendment Approval with Finance		N/A		Pending Final Approval	03/22/2023	Actions Review

Review each section of the Grantor Amendment to ensure that everything looks correct before approving. At the top of every Grantor Amendment is *Subrecipient Detail* information:

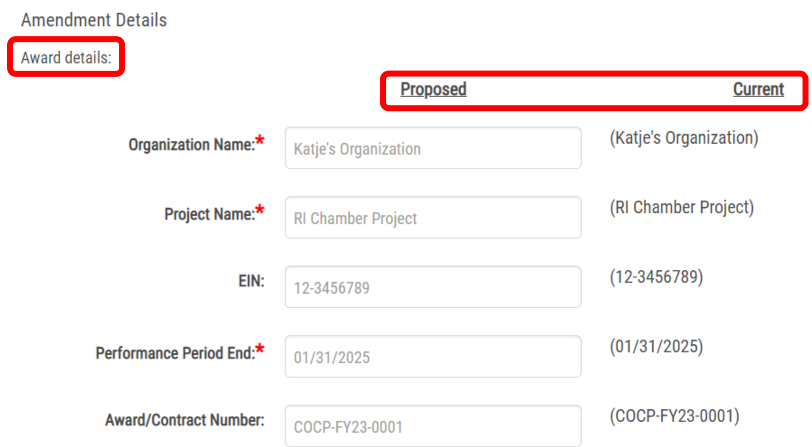
Subrecipient Detail

Award Detail

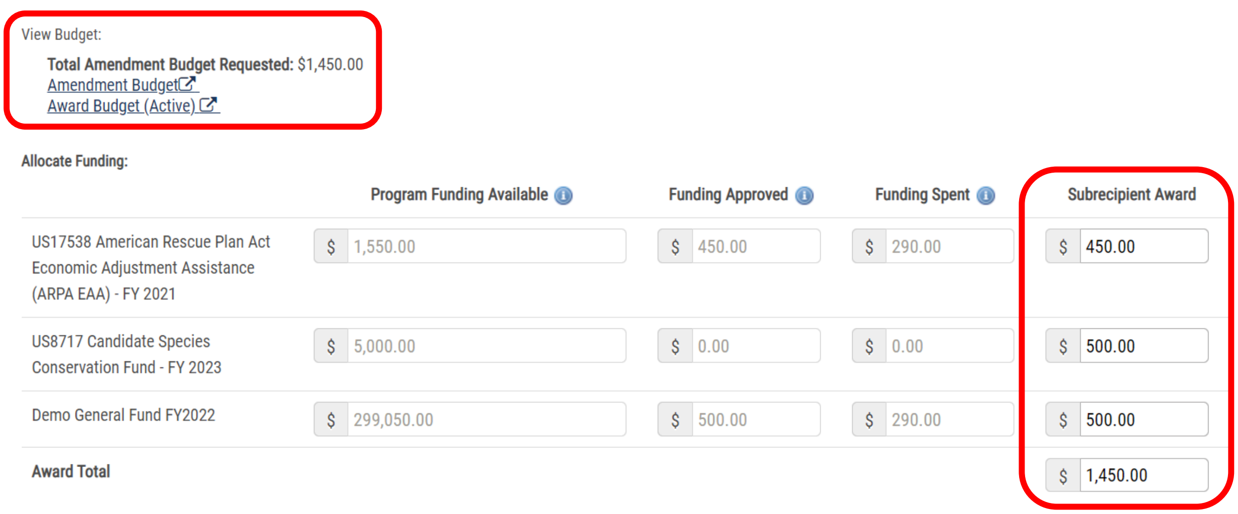
Subrecipient: A New Leaf - 124 Main Street
Vendor ID: 85-963
Organization: Katje's Organization
Project: RI Chamber Project
Award Manager: K. Benoit
Award Status: Awarded
Approval Date: 12/12/2022
Approved Amount: $950.00 +
Total Federal Award: $450.00
Total Other Award: $500.00
Total Match: $0.00
Performance Period: 12/01/2022 - 01/31/2025

Program: Chamber of Commerce Program
Award/Contract Number: COCP-FY23-0001
EIN: 12-3456789
Subrecipient Risk: Low
Award Type: N/A

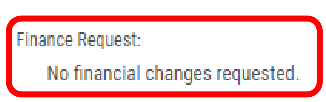
View the *Award Details* and any proposed changes. Fields that are greyed out indicate that no changes were requested.



In the *Allocate Funding* section, ensure the *Award Total* matches the *Total Amendment Budget Requested* amount. View-only copies of the Active budget and the Amendment budget can be viewed by clicking on the appropriate hyperlinks.



Note: If there were no financial changes proposed in the Grantor Amendment, the following message will show:



In the *Amendment Goals* section, ensure that proposed Target Units looks correct. Any fields that are greyed indicate that no changes were made.

Amendment Goals:

Goal / Objective	Target Units		Direct Cost Expenditure		Match Expenditure		Program Income Expenditure	
	Proposed	(Current)	Proposed	(Current)	Proposed	(Current)	Proposed	(Current)
Number of eligible small businesses that are served	55.00	(60.00)	$ 0.00	($0.00)	$ 0.00	($0.00)	$ 0.00	($0.00)
SubGoal								
Small Business Hair Salons	15.00	(20.00)	$ 0.00	($0.00)	$ 0.00	($0.00)	$ 0.00	($0.00)
Small Business Restaraunts	15.00	(15.00)	$ 0.00	($0.00)	$ 0.00	($0.00)	$ 0.00	($0.00)
Small Business Theaters	25.00	(25.00)	$ 0.00	($0.00)	$ 0.00	($0.00)	$ 0.00	($0.00)

Note: If there were no goal changes proposed in the Grantor Amendment, or if the Goals/Subgoals functionality is not set up for this subrecipient grant program, the above section will not appear in the Amendment. In the example above, the number of hair salons to be served is being reduced from 20 to 15, with a corresponding reduction in the total number of small businesses to be served.

Review any files that were uploaded by the state agency and/or the subrecipient during the Amendment process. If needed, additional files can also be uploaded at this time.

Amendment Files - External:

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

Attach Files

Search:

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

Showing 0 to 0 of 0 entries

Previous Next

Amendment Files - Internal:

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

Attach Files

Search:

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

Showing 0 to 0 of 0 entries

Previous Next

Finally, review the *Amendment Narrative* section for additional information on what was changed through this amendment process.

Amendment Narrative:

Amended the award budget to add funding to the Equipment category. Decreased the target units for Small Business Hair Salons subgoal. Additional documentation about this amendment is attached for reference.

Once the Amendment has been reviewed, several actions can be taken:

Approve | Return to First Approver | Return to Task Owner | Reject | Cancel

Approve: This will approve the Grantor Amendment. If you are part of a sequential approval workflow, the approved Amendment will then be sent to the next approver to review. If you are the final user in the approval workflow, approving the Amendment will move it to the status “Approved.” The subrecipient will receive an email notifying them an Amendment was approved and any changes to their award will take effect.

Return to First Approver: This button will only appear if the Amendment workflow is sequential. Use this button if you need a previous approver to review the Amendment again, and no changes are required by the Task Owner. You will be required to enter in a note explaining what modifications are being requested of the first approver.

Return to Task Owner: If you need the Task Owner to make changes to the proposed Amendment (edit the budget modification, attach additional back up documentation, edit the narrative, etc.) then use the Return to Task Owner button. This will return the Amendment back to the Task Owner where they can edit it before resubmitting. Once they resubmit, the report will re-enter the Amendment Approval Workflow before being sent back to the subrecipient to review and accept the changes.

Reject: This will reject the Amendment completely. If edits are needed for an Amendment, use the Return to Task Owner button and not the Reject button.

Cancel: This will close out of the page and any changes will not be saved.

Once the Grantor Amendment is approved, the *Current Status* will update to *Approved*.

Award Amendments

Search:

Amendment Date	Amendment Type	Current Status	Actions
03/22/2023	Grantor Amendment Approval	Approved	View Amendment

Subrecipient Initiated Amendments

When a change to a subrecipient award is requested, subrecipients will submit a Grant Amendment through eCivis. Grant Amendments can be used by subrecipients to request changes to the following:

- Organization Name
- Project Name
- EIN
  Performance Period End Date
- Any change to the budget
- Target Units for Goals and Subgoals

Reviewing and Approving a Grant Amendment Submitted by a Subrecipient

Depending on the type of Grant Amendment, the submitted request will enter an approval workflow:

> **Amendment Approval** – Submitted grant amendments that do not change the subrecipient's budget/award amount will enter this workflow.
>
> **Amendment Approval with Finance** – Submitted grant amendments that do change the subrecipient's budget/award amount will enter this workflow.

When a subrecipient submits a Grant Amendment, the user(s) in the appropriate Grant Amendment Approval Workflow will be notified via email that they have a pending task to review. For more information on setting up and editing approval workflows, reference the [Grantor Approval Workflow] user guide, and/or the training video [Approval Tab of the Solicitation]. An example of the automatic email sent to Grant Amendment Approval Workflow members is below:

eCivis

An approval task has been created that requires your attention in eCivis Grants Network.

Program:	Chamber of Commerce Program
Project:	Competitive Award Acceptance
Award/Contract Number:	COCP-FY23-0001
Subrecipient:	Katje's Organization
Task Type:	Amendment Approval
Approval Type:	Single User
Review Comment:	

Sincerely,

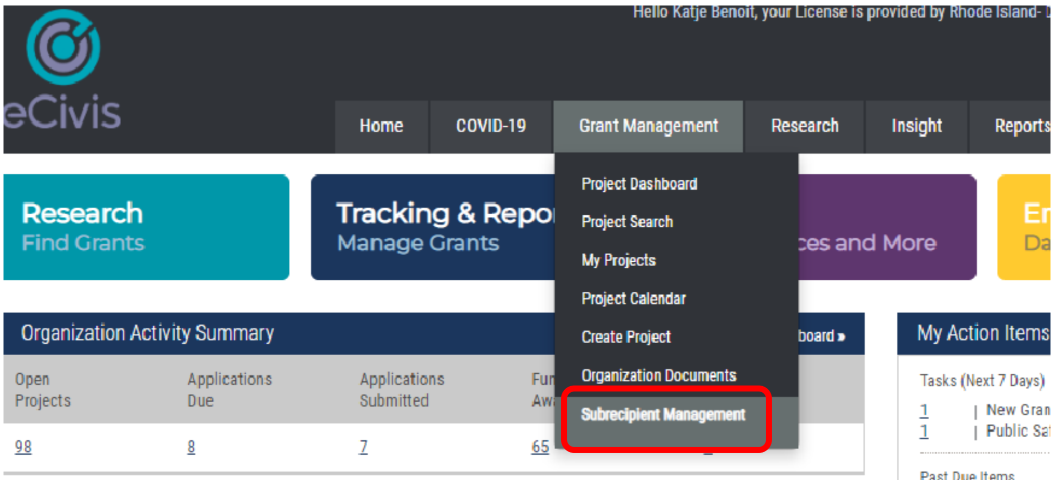
The eCivis Support Team

support@ecivis.com

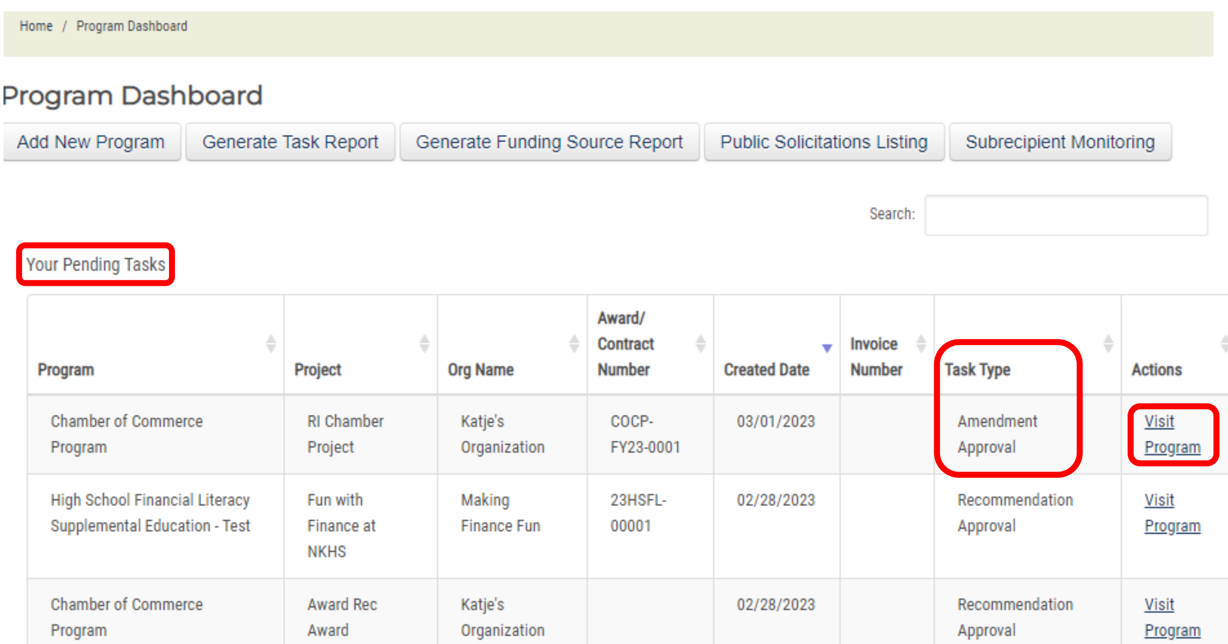
(877) 232-4847, option 2, 8am-5pm PT

STATE OF RHODE ISLAND
DEPARTMENT OF
ADMINISTRATION

Members of the approval group can also see all pending tasks by navigating to the Subrecipient Management module of eCivis. To do so, hover over the *Grant Management* tab and select *Subrecipient Management*



This will open the Grantor Program Dashboard. At the top of the page, the user will see all of their pending tasks. To review and approve a Grant Amendment, locate the task and click *Visit Program*.



DEPARTMENT OF ADMINISTRATION

This will open the Program Detail page. From the Program Detail page, an approver can scroll to their Pending Tasks table, click *Actions* and then *Review*.

Search:

Pending Tasks

Project	Org Name	Award/ Contract Number	Task Type	Reporting Period	Award Type	Invoice Number	Current Status	Submitted Date	Actions
RI Chamber Project	Katje's Organization	COCP-FY23-0001	Amendment Approval		N/A		Pending Approval	03/01/2023	Actions Review
test	Katje's Organization	RI-KB-001	Final Award Approval		N/A		Final Award Approval	02/09/2023	Actions

At the top of every Grant Amendment is *Subrecipient Detail* information.

Subrecipient Detail

Award Detail

Organization: Katje's Organization
Project: RI Chamber Project
Award Status: Awarded
Approval Date: 12/12/2022
Approved Amount: $900.00 +
Total Federal Award: $450.00
Total Other Award: $450.00
Total Match: $0.00
Performance Period: 12/01/2022 - 12/31/2024

Program: Chamber of Commerce Program
Award/Contract Number: COCP-FY23-0001
EIN: 12-3456789
Subrecipient Risk: Low
Award Type: N/A

Next will be the *Amendment Details.* The first section will show the Proposed vs. Current award details. Compare the 2 columns to review what changes the subrecipient is requesting. In the below example, the subrecipient is requesting a Project Name change and a one-month extension to their Performance Period End Date.

Amendment Details

Award details:

	Proposed	Current
Organization Name:*	Katje's Organization	(Katje's Organization)
Project Name:*	Competitive Award Acceptance	(RI Chamber Project)
EIN:	12-3456789	(12-3456789)
Performance Period End:*	01/31/2025	(12/31/2024)
Award/Contract Number:	COCP-FY23-0001	(COCP-FY23-0001)

STATE OF RHODE ISLAND
DEPARTMENT OF
ADMINISTRATION

The next section will show any financial changes requested. If no changes to the budget are requested, a no changes requested message will appear and the *Allocate Funding* section will be greyed out since no changes are needed.

Finance Request:
No financial changes requested.

Allocate Funding:

	Total Funding	Funding Available	Subrecipient Award
US17538 American Rescue Plan Act Economic Adjustment Assistance (ARPA EAA) - FY 2021	$ 2,000.00	$ 1,050.00	$ 450.00
Demo General Fund FY2022	$ 300,000.00	$ 295,050.00	$ 450.00
Award Total			$ 900.00

If the subrecipient does request a change to their budget, links to both the currently approved budget and the amendment budget will be provided. The new amount requested will also be provided. Use the budget links to view what changes the subrecipient is requesting.

View Budget:
Total Amendment Budget Requested: $950.00
Award Budget (Active)
Amendment Budget

To accept the budget changes the subrecipient requested, update the *Allocation Funding* section so the *Award Total* and the *Total Amendment Budget Requested* amounts match.

View Budget:
Total Amendment Budget Requested: $950.00
Award Budget (Active)
Amendment Budget

Allocate Funding:

	Total Funding	Funding Available	Subrecipient Award
US17538 American Rescue Plan Act Economic Adjustment Assistance (ARPA EAA) - FY 2021	$ 2,000.00	$ 1,050.00	$ 450.00
Demo General Fund FY2022	$ 300,000.00	$ 295,050.00	$ 500.00
Award Total			$ 950.00

If you do not accept the subrecipient's budget changes, or need them to edit the request and resubmit, scroll to the bottom of the page to Return to Subrecipient or Reject.

The next section in a Grant Amendment is the *Amendment Goals*. Note: This section will only appear if you set up Goals and Subgoals for the subrecipient grant program. Compare the Proposed vs. Current columns to view the changes requested by the subrecipient. Fields that are greyed out mean no changes were requested. In the example below, the numbers of hair salons and restaurants to be served are being reduced, with a corresponding reduction in the total number of small businesses to be served.

Amendment Goals:

Goal / Objective	Target Units		Direct Cost Expenditure		Match Expenditure		Program Income Expenditure	
	Proposed	(Current)	Proposed	(Current)	Proposed	(Current)	Proposed	(Current)
Number of eligible small businesses that are served	60.00	(75.00)	$ 0.00	($0.00)	$ 0.00	($0.00)	$ 0.00	($0.00)
SubGoal								
Small Business Hair Salons	20.00	(25.00)	$ 0.00	($0.00)	$ 0.00	($0.00)	$ 0.00	($0.00)
Small Business Restaraunts	15.00	(25.00)	$ 0.00	($0.00)	$ 0.00	($0.00)	$ 0.00	($0.00)
Small Business Theaters	25.00	(25.00)	$ 0.00	($0.00)	$ 0.00	($0.00)	$ 0.00	($0.00)

The next section is the *Amendment Files*. Any files that were uploaded by the subrecipient when submitting this Grant Amendment will be listed in the *Amendment Files – External* table. If needed, state agency approvers can add files in the *Amendment Files – External* or the *Amendment Files – Internal* sections. Files loaded to the *Amendment Files – Internal* will be kept for reference with this Grant Amendment request, but not visible to the subrecipient.

Highly recommended: Complete and upload the Subaward Amendment Template to amendments created in eCivis. Until eCivis functionality for viewing past amendments improves, both parties will benefit from attached Subaward Amendments.

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

Attach Files

Search:

File Name	File Size	Created On	Actions
Test File.docx	11.7 Kb	03/01/2023	

Showing 1 to 1 of 1 entries

Previous 1 Next

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

Attach Files

Search:

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

Showing 0 to 0 of 0 entries

Previous Next

The final section is the *Amendment Narrative*. Before submitting a Grant Amendment, subrecipients are required to enter a narrative. Review this section for more information on what the subrecipient is requesting.

Amendment Narrative:

Requesting 1-month extension to performance period end date.

Resubmitting on 2/24

Once you have reviewed all information in the Grant Amendment, different actions can be taken:

Save: This will save any changes that have been made to the Grant Amendment while reviewing. Saving the Grant Amendment allows you to close out of the page and come back to finish reviewing/approving at a later date.

Approve: This will approve the Grant Amendment. If you are part of a sequential approval workflow, the approved Amendment will then be sent to the next approver to review. If you are the final user in the approval workflow, the Amendment will be marked “Approved” and the subrecipient will receive an email notifying them their Amendment was approved. Any changes requested and approved will be automatically made to the subrecipients award in eCivis.

Return to First Approver: This button will only appear if the Amendment workflow is sequential. Use this button if you need a previous approver to modify the Amendment, and the subrecipient does not need to make any changes. You will be required to enter in a note explaining what modifications are being requested of the first approver.

Return to Subrecipient: If you need the subrecipient to make changes to the Amendment (edit the budget modification, attach additional back up documentation, edit their narrative, etc.) then use the Return to Subrecipient button. This will return the Amendment back to the subrecipient where they can edit it before resubmitting to you. Once they resubmit, the report will re-enter the Amendment Approval Workflow.

Reject: This will reject the Amendment completely. The subrecipient will receive an automatic email that their Amendment has been rejected and if they need to re-submit, they will need to start over. If edits are needed for an Amendment, use the Return to Subrecipient button and not the Reject button.

DEPARTMENT OF ADMINISTRATION

Reviewing and Approving an Activity Report

Activity Reports are used to track a subrecipients progress on their project through documentation, narrative, and target goals. When a subrecipient submits an Activity Report, the user(s) in the Activity Report Approval Workflow will be notified via email that they have a pending task to review. For more information on setting up and editing approval workflows, reference the [Grantor Approval Workflow] user guide, and/or the training video [Approval Tab of the Solicitation]. An example of the automatic email sent to Activity Report Approval Workflow members is below:

eCivis

An approval task has been created that requires your attention in eCivis Grants Network.

Program:	Chamber of Commerce Program
Project:	RI Chamber Project
Award/Contract Number:	COCP-FY23-0001
Subrecipient:	Katje's Organization
Task Type:	Activity Report Approval
Approval Type:	Sequential Group
Review Comment:	

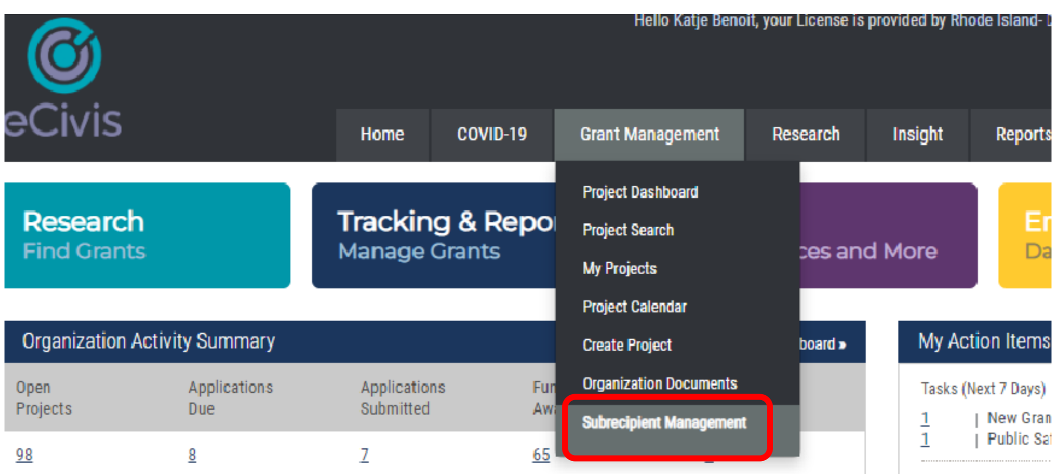
Sincerely,

The eCivis Support Team

support@ecivis.com

(877) 232-4847, option 2, 8am-5pm PT

Members of the approval group can also see all pending tasks by navigating to the Subrecipient Management module of eCivis. To do so, hover over the *Grant Management* tab and select *Subrecipient Management*



This will open the Grantor Program Dashboard. At the top of the page, the user will see all of their pending tasks. To review and approve an Activity Report, locate the task and click *Visit Program.*

Home / Program Dashboard

Program Dashboard

Add New Program | Generate Task Report | Generate Funding Source Report | Public Solicitations Listing | Subrecipient Monitoring

Search:

Your Pending Tasks

Program	Project	Org Name	Award/ Contract Number	Created Date	Invoice Number	Task Type	Actions
Direct Award Test2	Goals Test	Katje's Organization	RI-TEST-2022-003	02/21/2023		Activity Report Approval	Visit Program
Chamber of Commerce Program	RI Chamber Project	Katje's Organization	COCP-FY23-0001	03/01/2023		Activity Report Approval	Visit Program

This will open the Program Detail page. From the Program Detail page, an approver can scroll to their Pending Tasks table, click *Actions* and then *Review*

Pending Tasks

Project	Org Name	Award/ Contract Number	Task Type	Reporting Period	Award Type	Invoice Number	Current Status	Submitted Date	Actions
RI Chamber Project	Katje's Organization	COCP-FY23-0001	Activity Report Approval	02/01/2023 - 02/28/2023	N/A		Pending Approval	03/01/2023	Actions Review
test	Katje's Organization	RI-KB-001	Final Award Approval		N/A		Final Award Approval	02/09/2023	Actions

At the top of every submitted Activity Report is *Subrecipient Detail* information.

Subrecipient Detail

Award Detail

Subrecipient: A New Leaf - 124 Main Street
Vendor ID: 85-963
Organization: Katje's Organization
Project: RI Chamber Project
Award Manager: K. Benoit
Award Status: Awarded
Approval Date: 12/12/2022
Approved Amount: $950.00 +
Total Federal Award: $450.00
Total Other Award: $500.00
Total Match: $0.00
Performance Period: 12/01/2022 - 01/31/2025

Program: Chamber of Commerce Program
Award/Contract Number: COCP-FY23-0001
EIN: 12-3456789
Subrecipient Risk: Low
Award Type: N/A

The next section is *Activity Report Details* which includes the reporting period and narrative about their report and award progress.

Activity Report Details

Reporting Period: 02/01/2023 - 02/28/2023

Activity Report Narrative:

In the month of February, we were able to assist 5 small businesses.

Documentation of our progress is attached to this Activity Report.

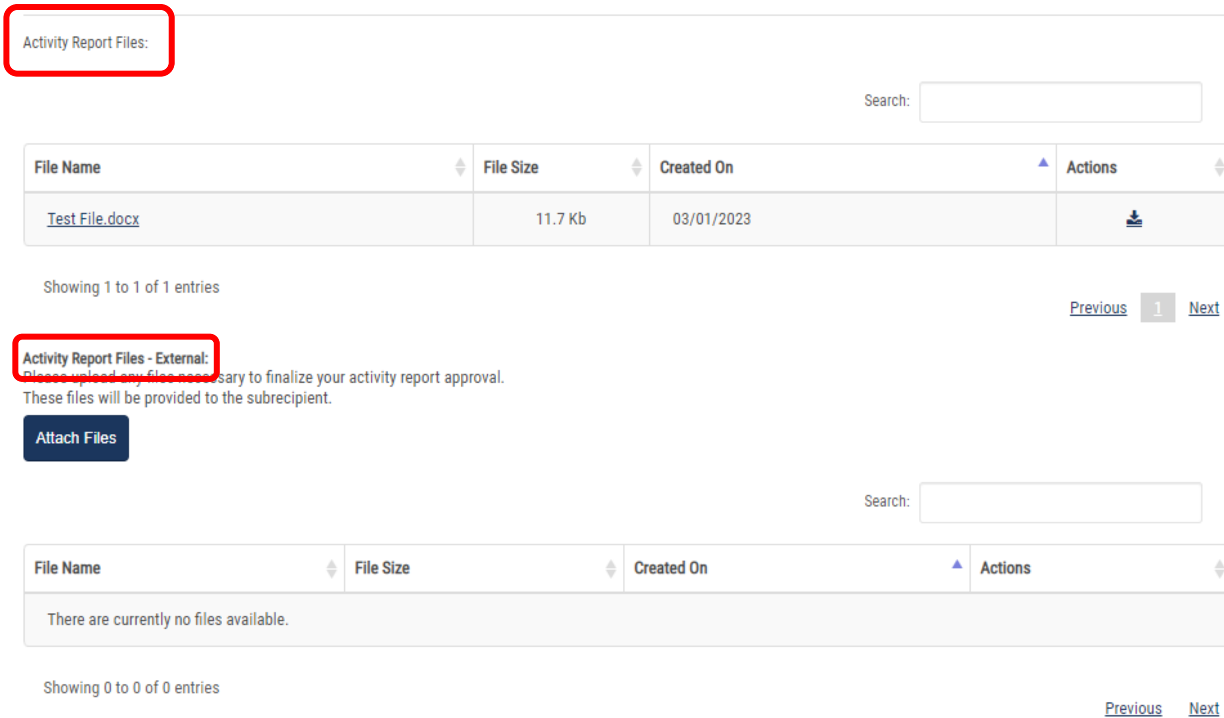
The next section is *Activity Report Goals* where the subrecipient entered the completed units during this reporting period for their goals and subgoals. Any reported amount of award spend and/or match spend with completed units does not impact the subrecipient's budget or available balance but is available for reference.

Activity Report Goals:

Goal / Objective	Completed Units	Award Spend	Match Spend	Program Income Spend
Number of eligible small businesses that are served:	5.00	$ 0.00	$ 0.00	$ 0.00
Subgoals				
Small Business Hair Salons:	3.00	$ 0.00	$ 0.00	$ 0.00
Small Business Restaraunts:	1.00	$ 0.00	$ 0.00	$ 0.00
Small Business Theaters:	1.00	$ 0.00	$ 0.00	$ 0.00

Note: If goals and subgoals were not set up for this subrecipient grant program, this section will not appear in a submitted Activity Report.

The last section is the *Activity Report Files* where approvers can view any documentation that a subrecipient submitted to support this Activity Report. If needed, an agency user can also attach files under the *Activity Report Files – External* section.



Once an Activity Report has been reviewed, different actions can be taken:

Approve: This will approve the Activity Report. If you are part of a sequential approval workflow, the approved Activity Report will then be sent to the next approver to review. If you are the final user in the approval workflow, the Activity Report will be marked "Approved" and the subrecipient will receive an email notifying them the report was approved.

Return to Subrecipient: If you need the subrecipient to make changes to the Activity Report, then use the Return to Subrecipient button. This will return the report back to the subrecipient where they can edit it before resubmitting to you. Once they resubmit, the report will re-enter the Activity Report Approval Workflow.

Reject: This will reject the report completely. The subrecipient will receive an automatic email that their report has been rejected and if they need to re-submit, they will need to start over. If edits are needed for a report, use the Return to Subrecipient button and not the Reject button.

Miscellaneous Tasks

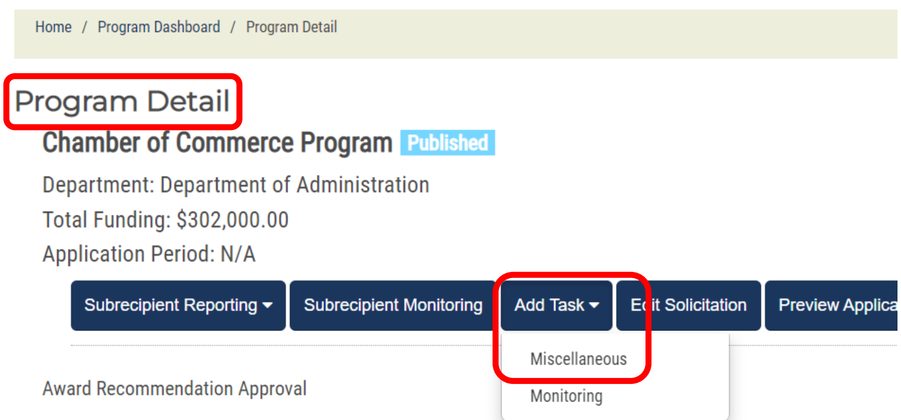
Miscellaneous Tasks are used to collect information that cannot be captured in Financial or Activity Reports. A Miscellaneous Task can be created and assigned to an individual subrecipient, to all subrecipients in one program, or to a state agency user.

Internal Miscellaneous Tasks

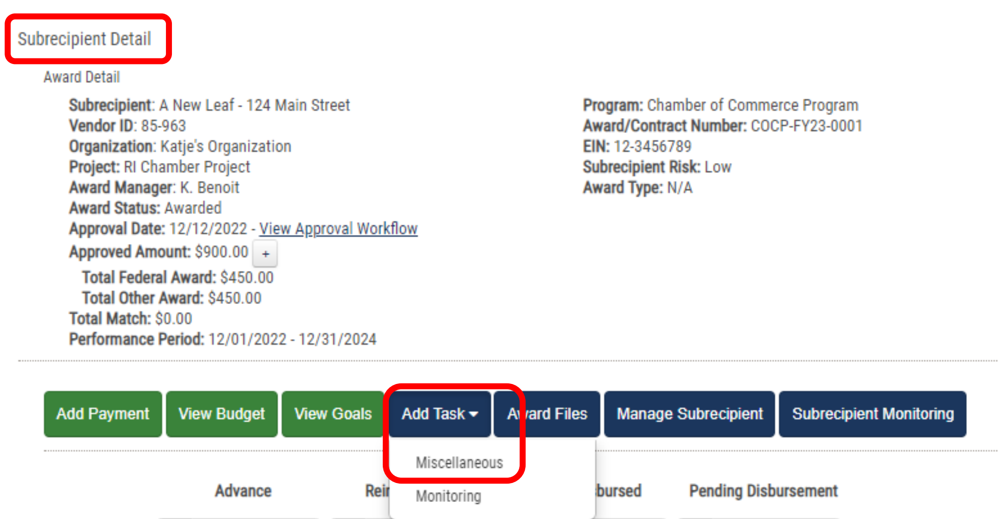
Internal Miscellaneous Tasks are used to collaborate internally with your state agency. Internal Miscellaneous Tasks are not visible to the subrecipient(s).

Creating and Assigning Internal Miscellaneous Tasks

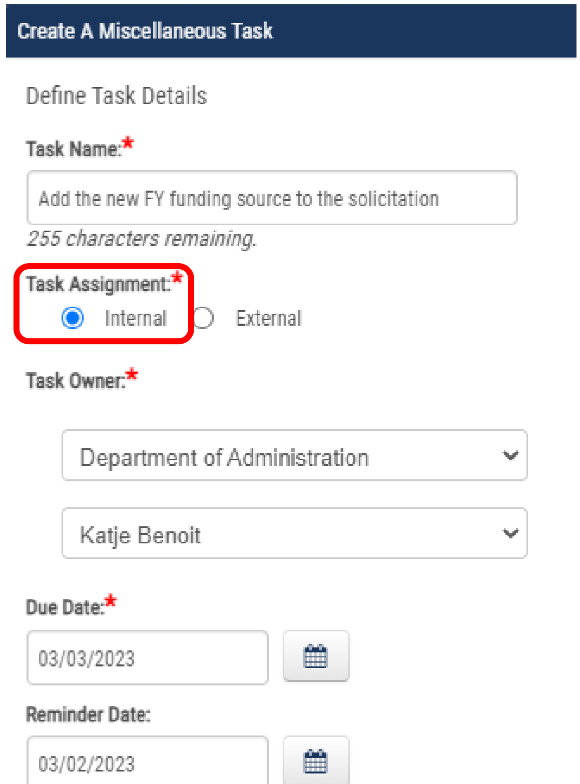
Internal Miscellaneous Tasks can be used to assign an action item to a member of your team. These tasks stay at the state agency level and do not notify the subrecipient(s). To create an Internal Miscellaneous Task, navigate to the *Program Detail* page of the appropriate subrecipient grant program. From the *Program Detail* page, select *Add Task* and select *Miscellaneous* from the drop down. The *Add Task* button can also be accessed from a *Subrecipient Detail* page.



OR



This will open a pop up where you can define the task details.



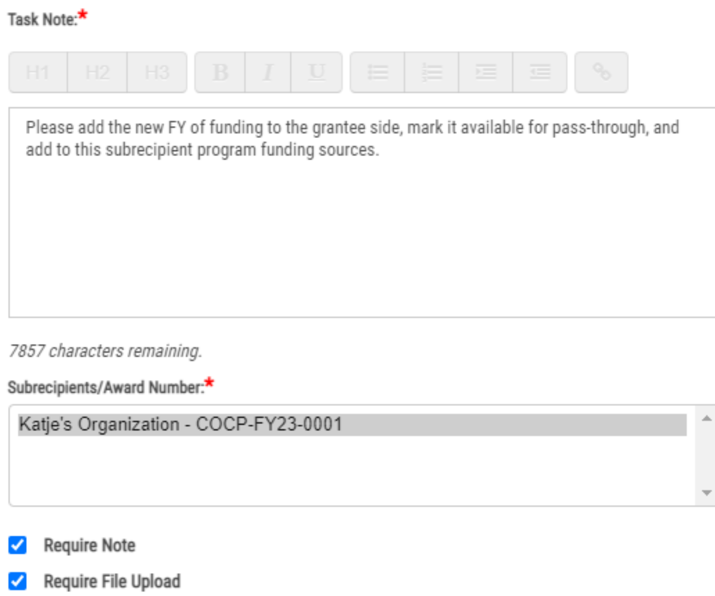
Task Name: Give a title to the task

Task Assignment: Select *Internal*

Task Owner: Select the state agency user who will be responsible for completing this task

Due Date: When the task should be completed by

Reminder Date: Optional field, a reminder email will be sent to the Task Owner on this date notifying them they still need to complete the task



Task Note: Provide additional information to the Task Owner on what it is that needs to be completed.

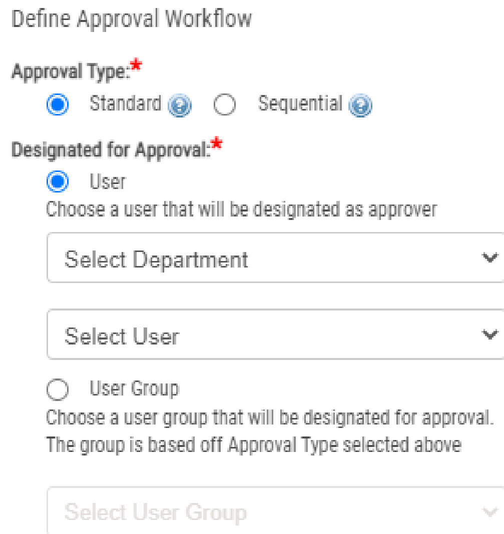
Subrecipients/Award Number: Select the subrecipient(s) and subaward(s) that this task applies to. Multiple subrecipients can be selected by holding the Ctrl key and selecting different awards. Subrecipient(s) selected here will not be notified of the creation of an Internal Miscellaneous Task.

Require Note: Checkbox determines if the Task Owner needs to provide a narrative/note at the time of marking the task complete.

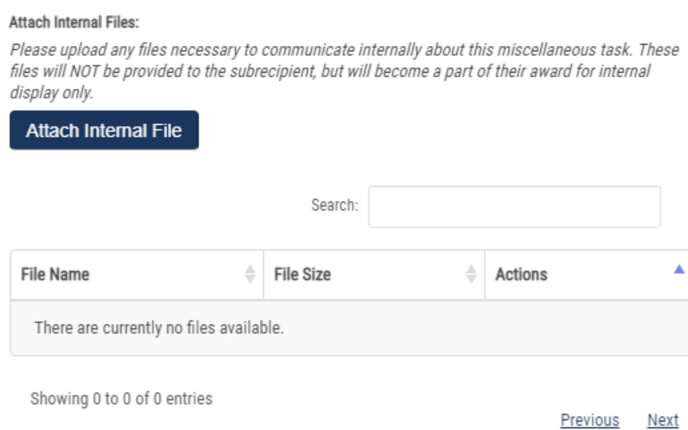
Require File Upload: Checkbox determines if the Task Owner needs to provide a file at the time of marking the task complete.

Organization Tag: This is an optional field, where you can flag the Miscellaneous Task as a specific category.

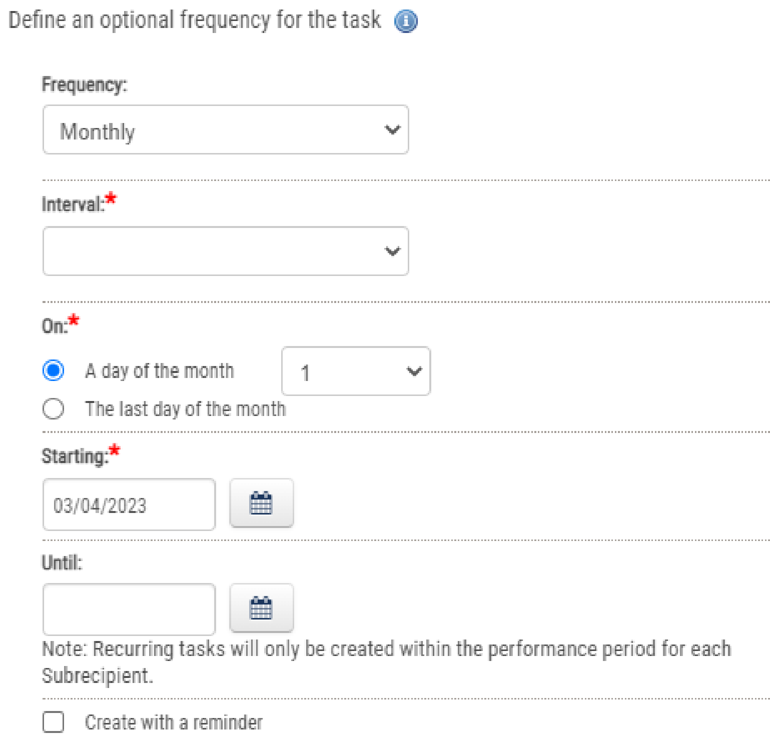
Define the approval workflow for this Miscellaneous Task. Similar to the Approval tab in your solicitation, a standard user, standard group, or sequential group can be selected. This is the approval workflow the Task Owner's response will go through once they submit the task.



In the *Attach Internal Files* section, add any files that are necessary for the Task Owner to reference before completing the task.



If the Internal Miscellaneous Task needs to be repeated on a cadence, a frequency can be set up. Select the frequency, interval, due date, and start and end dates. If the task does not need to be repeated, select N/A under the Frequency dropdown.



Once all required fields have been completed, you can save the task. Clicking *Save* will create the task and notify the Task Owner they have a pending item to complete. If you click *Cancel*, the Task will be discarded.

Completing an Internal Miscellaneous Task

If an Internal Miscellaneous Task has been assigned to you to complete, you will receive an email notification, example below:

eCivis

The following task has been assigned to you:

- Task Name: Add the new FY funding source to the solicitation
- Program Name: Chamber of Commerce Program
- Due Date: 3/3/2023
- Task Notes :

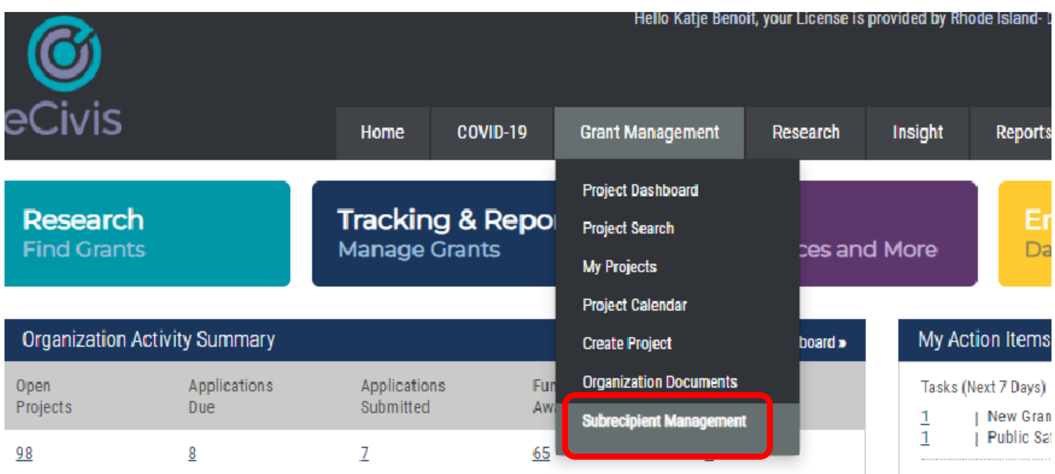
Please add the new FY of funding to the grantee side, mark it available for pass-through, and add to this subrecipient program funding sources.

To access this internal task, go to the Program Dashboard [mandrillapp.com]

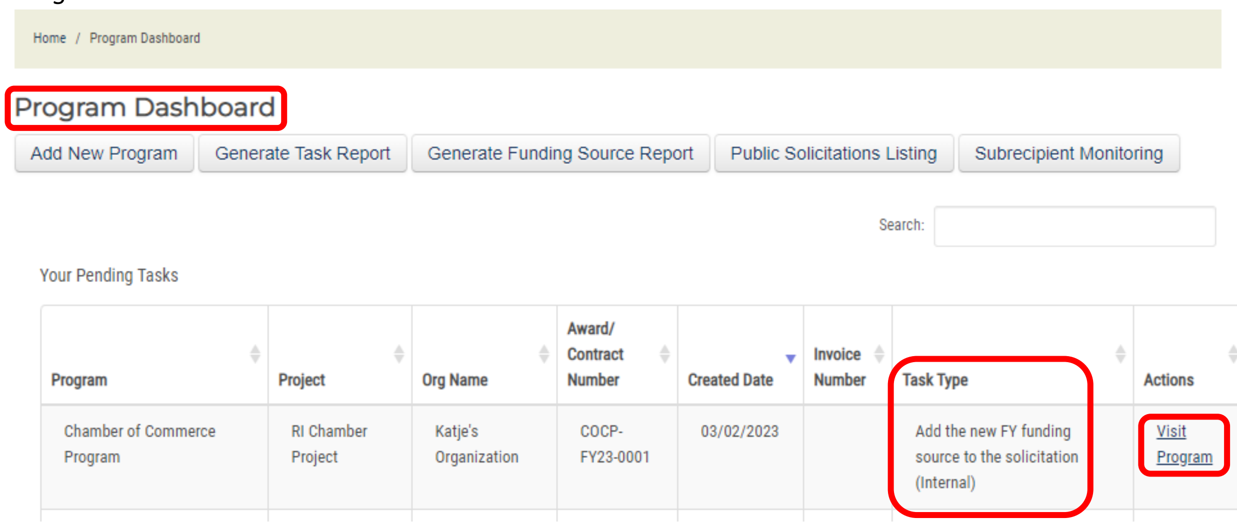
Please contact support@ecivis.com for technical issues or questions.

Sincerely,
Test

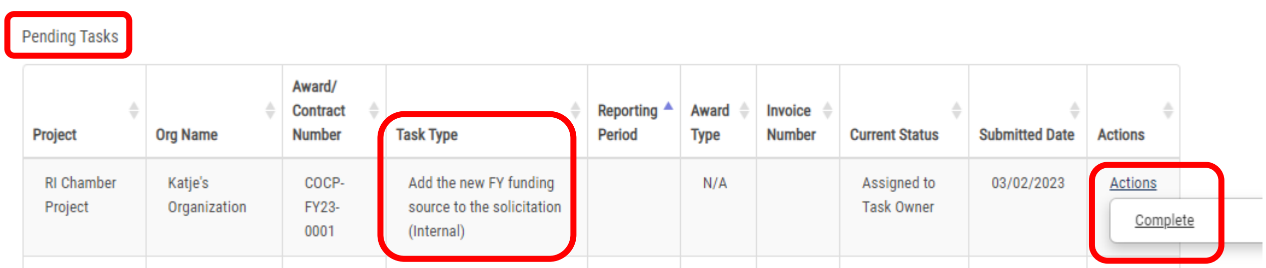
The Task Owner can also see all pending tasks by navigating to the Subrecipient Management module of eCivis. To do so, hover over the *Grant Management* tab and select *Subrecipient Management*



This will open the Grantor Program Dashboard. At the top of the page, the user will see all of their pending tasks. To review and complete an Internal Miscellaneous Task, locate the task and click *Visit Program.*



This will open the Program Detail page. From the Program Detail page, a Task Owner can scroll to their Pending Tasks table, click *Actions* and then *Complete*



This will open the Internal Miscellaneous Task. At the top of the page will be information on the subrecipient grant program, title of the task, the due date, and notes/instructions.

Program Detail

Chamber of Commerce Program Published

Department: Department of Administration

Total Funding: $302,000.00

Application Period: N/A

Complete Internal Task

Task Name: Add the new FY funding source to the solicitation

Task Owner: Katje Benoit

Task Due Date: 03/03/2023

Notes from Creator:

Please add the new FY of funding to the grantee side, mark it available for pass-through, and add to this subrecipient program funding sources.

Scrolling down, there is space for you to enter a note regarding completion of the task and attach any relevant files. Any files attached to an Internal Miscellaneous Task will not be visible to the subrecipient(s). If the *Notes* and/or *Misc Task Files* fields are marked required, information needs to be input before the task can be marked complete. Additionally – any files uploaded by the user who created the task will appear in the list of files.

Notes:*

H1 H2 H3 B I U

I have added the new grant to the grantee side and it has been added to the solicitation.

7911 characters remaining.

Misc Task Files:*

Attach Internal Files

Search:

File Name	File Size	Created On	Actions
Submitting a Grant Amendment.docx	420.4 Kb	03/02/2023	
Test File.docx	11.7 Kb	03/02/2023	

Once complete, you can send the Internal Miscellaneous Task response for approval or save it and complete at a later date. Clicking *Cancel* will discard any changes.

After the task is sent for approval, the status in your *Pending Tasks* table will be *Pending Approval*.

Pending Tasks

Project	Org Name	Award/ Contract Number	Task Type	Reporting Period	Award Type	Invoice Number	Current Status	Submitted Date	Actions
RI Chamber Project	Katje's Organization	COCP-FY23-0001	Add the new FY funding source to the solicitation (Internal)		N/A		Pending Approval	03/02/2023	Actions

If the task response is returned for changes, you will receive an email notification including specific notes from the approver on what changes are requested, example below:

eCivis

The following task has returned to you from an Approver:

- Task Name: Add the new FY funding source to the solicitation
- Program Name: Chamber of Commerce Program
- Due Date: 3/3/2023
- Notes from the Approver : Please upload additional backup documentation.
- Link [mandrillapp.com] to the Program Dashboard

The Current Status in your *Pending Tasks* table will also update to *Changes Requested.* Click on *Actions* and *Complete.* Follow the same steps as above to complete the task and re-submit for approval.

Pending Tasks

Project	Org Name	Award/ Contract Number	Task Type	Reporting Period	Award Type	Invoice Number	Current Status	Submitted Date	Actions
RI Chamber Project	Katje's Organization	COCP-FY23-0001	Add the new FY funding source to the solicitation (Internal)		N/A		Changes Requested	03/02/2023	Actions Complete

Reviewing and Approving an Internal Miscellaneous Task

When the Task Owner marks the Internal Miscellaneous Task as complete, the user(s) in the approval workflow will be notified via email that they have a pending task to review. An example of the automatic email sent to an Internal Miscellaneous Task approval member(s) is below:

eCivis

An approval task has been created that requires your attention in eCivis Grants Network.

Program:	Chamber of Commerce Program
Project:	RI Chamber Project
Award/Contract Number:	COCP-FY23-0001
Subrecipient:	Katje's Organization
Task Type:	Internal Task
Approval Type:	Sequential Group
Review Comment:	

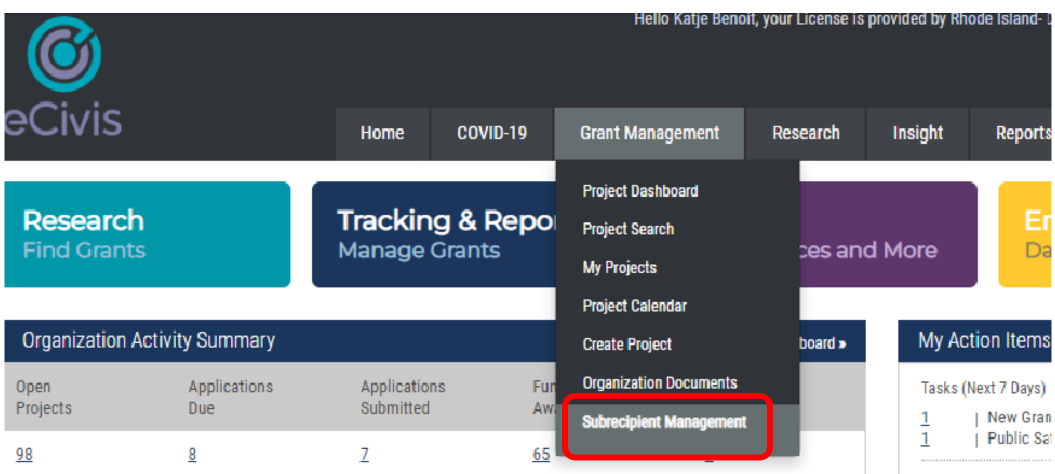
Sincerely,

The eCivis Support Team

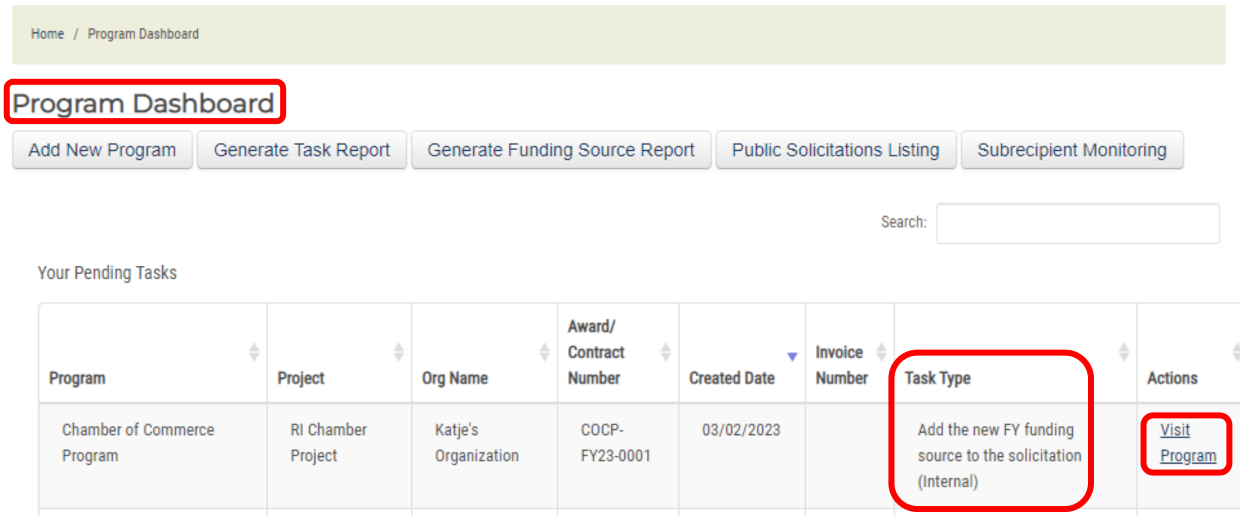
support@ecivis.com

(877) 232-4847, option 2, 8am-5pm PT

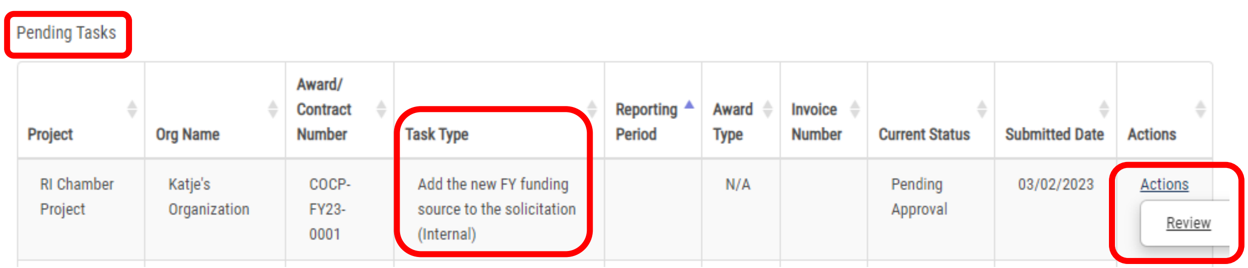
The approver can also see all pending tasks by navigating to the Subrecipient Management module of eCivis. To do so, hover over the *Grant Management* tab and select *Subrecipient Management*



This will open the Grantor Program Dashboard. At the top of the page, the user will see all of their pending tasks. To review and complete an Internal Miscellaneous Task, locate the task and click *Visit Program.*



This will open the Program Detail page. From the Program Detail page, the approver can scroll to their Pending Tasks table, click *Actions* and then *Review.*



This will open the Internal Miscellaneous Task response. At the top of the page will be summary information about the subrecipient grant program as well as notes that were initially provided to the Task Owner and the Task Owner's response.

Program Detail

Chamber of Commerce Program Published

Department: Department of Administration

Total Funding: $302,000.00

Application Period: N/A

Misc Task

Title: Add the new FY funding source to the solicitation

Note:

Please add the new FY of funding to the grantee side, mark it available for pass-through, and add to this subrecipient program funding sources.

Response:

Completed on 3/2/23

Scrolling down, any files uploaded by the user who originally created the Internal Miscellaneous Task and/or uploaded by the Task Owner during their response will show under *Misc Task Files.* If needed, additional files can be uploaded using the *Attach Internal File* button. These files will not be visible to your subrecipient(s).

Misc Task Files:

Attach Internal File

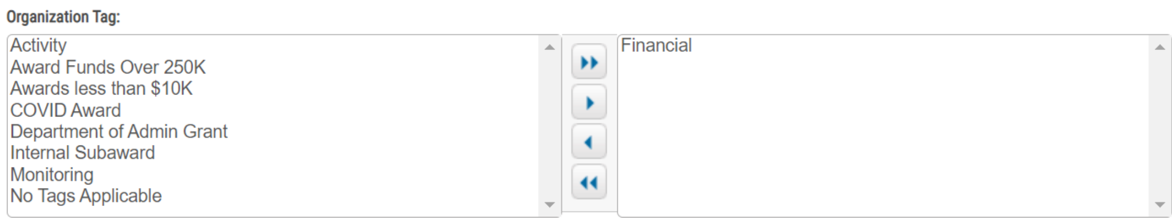
Search:

File Name	File Size	Created On	Actions
Submitting a Grant Amendment.docx	420.4 Kb	03/02/2023	
Test File.docx	11.7 Kb	03/02/2023	

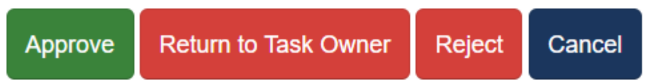
Showing 1 to 2 of 2 entries

Previous 1 Next

The last section is an optional action to add a tag to the task. This can help flag the Miscellaneous Task as a specific category.



Once reviewed, different actions can be taken:



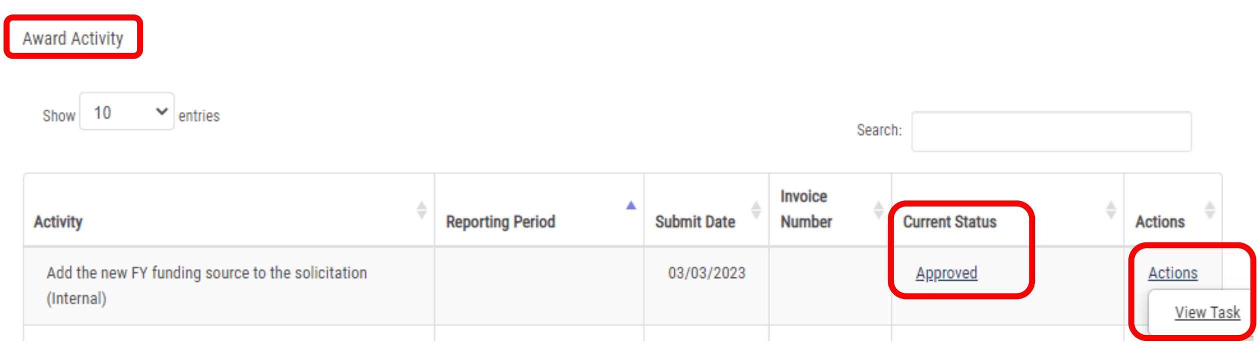
Approve: Approves the Internal Miscellaneous Task. If you are part of a sequential approval workflow, the approved task will then be sent to the next approver to review. If you are the final user in the approval workflow, the Internal Miscellaneous Task will be marked "Approved."

Return to Task Owner: If you need the Task Owner to edit their response, use this button to provide a note to them and return it for changes. The Task Owner can then edit their response before re-submitting for approval.

Reject: This will reject the task and no further action can be taken on this task. If edits are required, use the *Return to Task Owner* action instead of *Reject*.

Cancel: This will close out of the task approval.

Once the Internal Miscellaneous Task has been approved, it can be referenced by navigating to the *Subrecipient Detail* page of the subrecipient(s) that were selected when the task was originally created. Clicking *Actions* then *View Task* opens a copy of the approved Internal Miscellaneous Task.

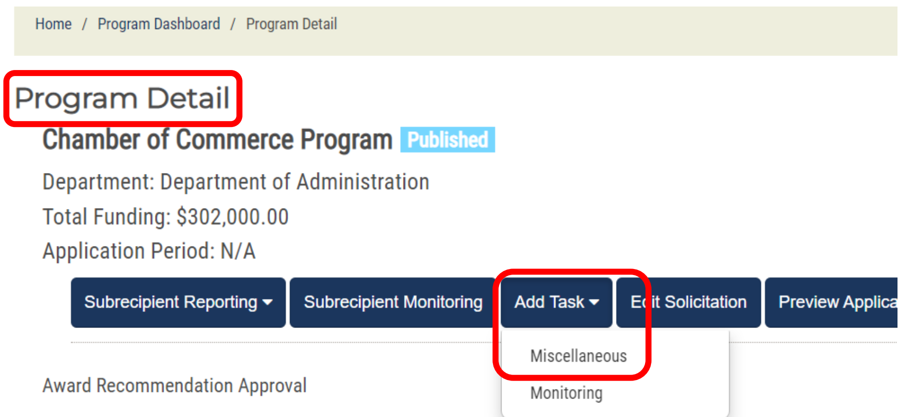


External Miscellaneous Tasks

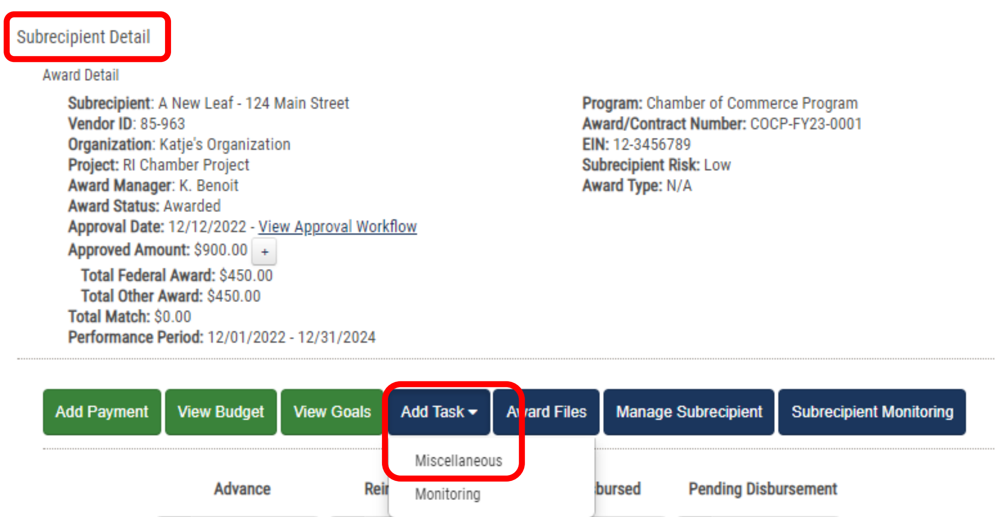
External Miscellaneous Tasks are used to collect information from subrecipient(s) that cannot be captured in Financial or Activity Reports. An External Miscellaneous Task can be created and assigned to an individual subrecipient or to multiple/all subrecipients in one program.

Creating and Assigning External Miscellaneous Tasks

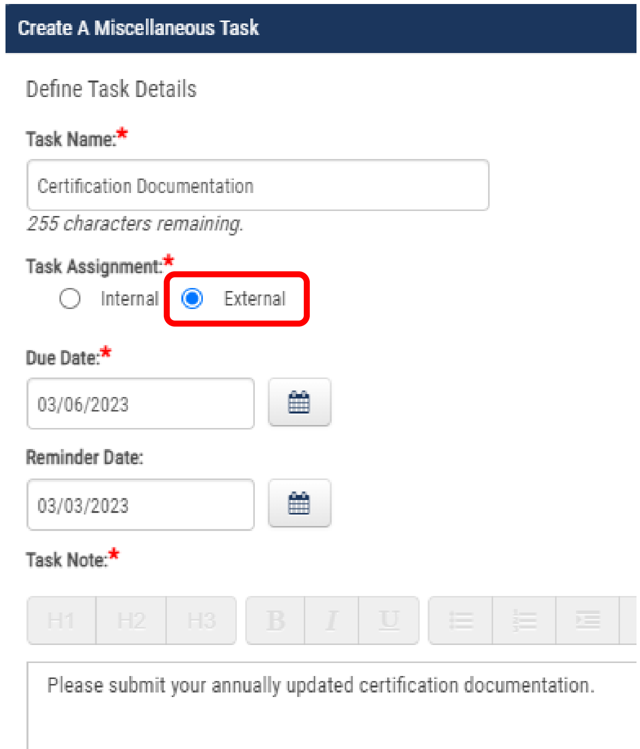
To create an External Miscellaneous Task, navigate to the *Program Detail* page of the appropriate subrecipient grant program. From the *Program Detail* page, select *Add Task* and select *Miscellaneous* from the drop down. The *Add Task* button can also be accessed from a *Subrecipient Detail* page.



OR



This will open a pop up where you can define the task details.



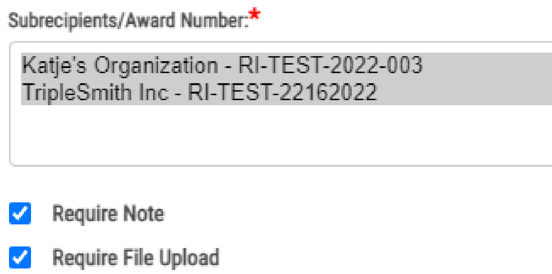
Task Name: Give a title to the task

Task Assignment: Select *External*

Due Date: When the task should be completed by

Reminder Date: Optional field, a reminder email will be sent to the subrecipient(s) on this date notifying them they still need to complete the task

Task Note: Provide additional information to the subrecipient(s) on what it is that needs to be completed.



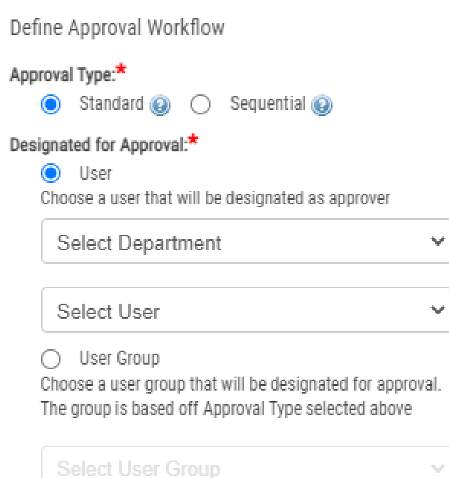
Subrecipients/Award Number: Select the subrecipient(s) and subaward(s) that this task will be assigned to. Multiple subrecipients can be selected by holding the Ctrl key and selecting different awards.

Require Note: Checkbox determines if the subrecipient(s) needs to provide a narrative/note at the time of marking the task complete.

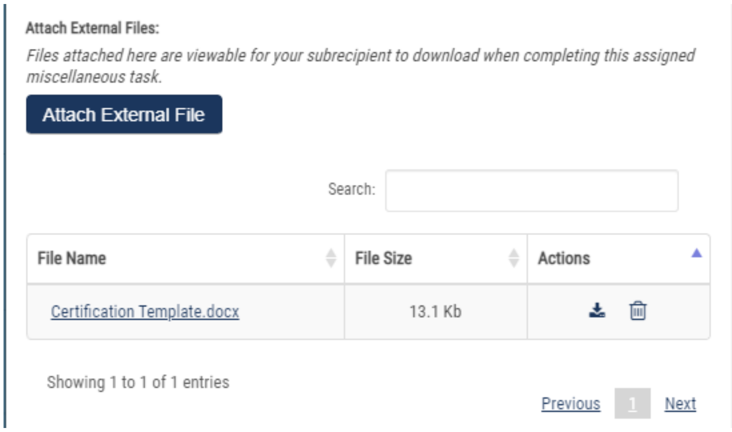
Require File Upload: Checkbox determines if the subrecipient(s) needs to provide a file at the time of marking the task complete.

Organization Tag: This is an optional field, where you can flag the Miscellaneous Task as a specific category.

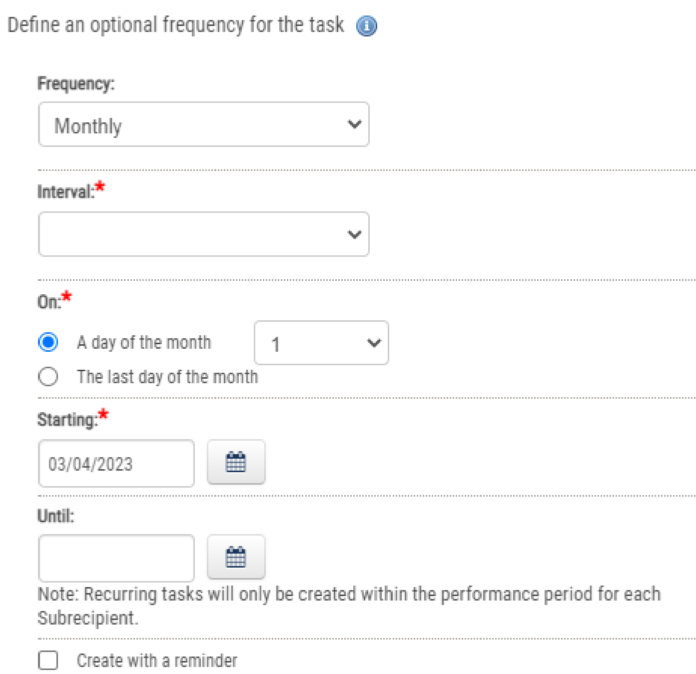
Define the approval workflow for this External Miscellaneous Task. Similar to the Approval tab in your solicitation, a standard user, standard group, or sequential group can be selected. This is the approval workflow the subrecipient(s)' response will go through once they submit the task for approval.



In the *Attach External Files* section, upload any files that the subrecipient(s) may need to reference before completing the task.

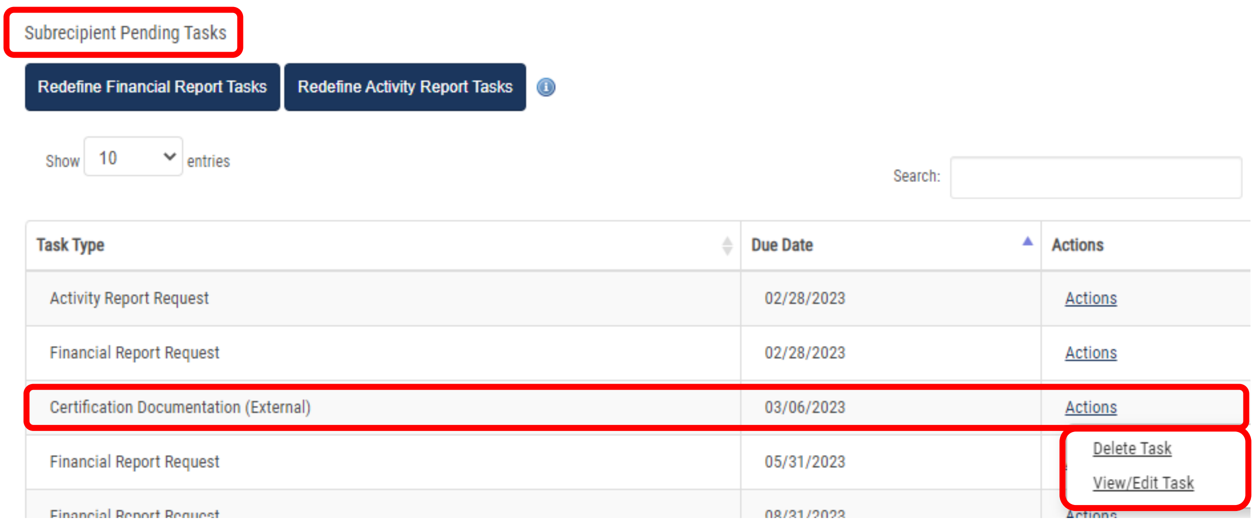


If the External Miscellaneous Task needs to be repeated on a cadence, a frequency can be set up. Select the frequency, interval, due date, and start and end dates. If the task does not need to be repeated, select N/A under the Frequency dropdown.



Once all required fields have been completed, you can save the task. Clicking *Save* will create the task and add it to the subrecipient(s) pending tasks table. If you click *Cancel*, the Task will be discarded.

Once saved, you can view the External Miscellaneous Task in your subrecipient(s) *Subrecipient Pending Tasks* table on the *Subrecipient Detail* page. Subrecipient(s) that this task was assigned to will also see the pending task in their eCivis Portal Award Dashboard. If needed, clicking the *Actions* allows you to either delete or edit the task.



Reviewing and Approving an External Miscellaneous Task

When a subrecipient submits an External Miscellaneous Task, the user(s) in the approval workflow will be notified via email that they have a pending task to review. An example of the automatic email sent to approval workflow members is below:


eCivis

An approval task has been created that requires your attention in eCivis Grants Network.

Program: Chamber of Commerce Program
Project: RI Chamber Project
Award/Contract Number: COCP-FY23-0001
Subrecipient: Katje's Organization
Task Type: Misc Task
Approval Type: Sequential Group
Review Comment:

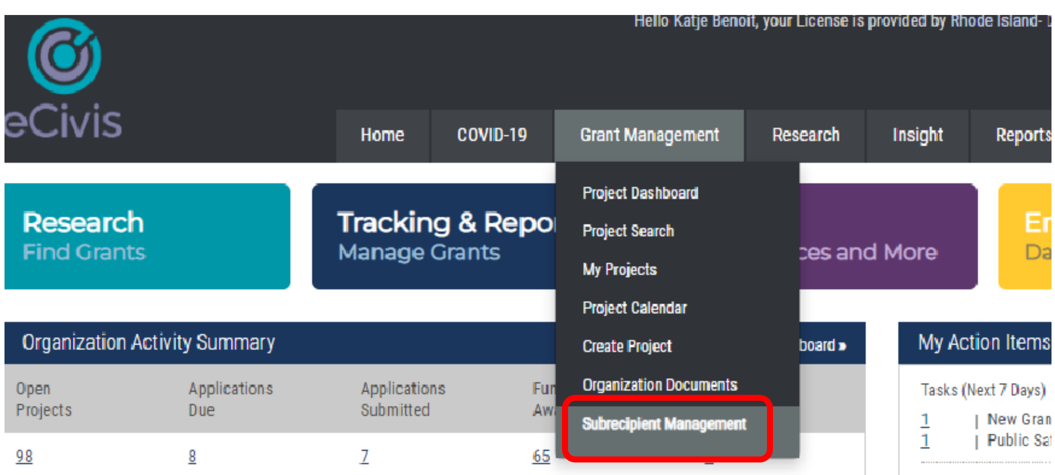
Sincerely,

The eCivis Support Team

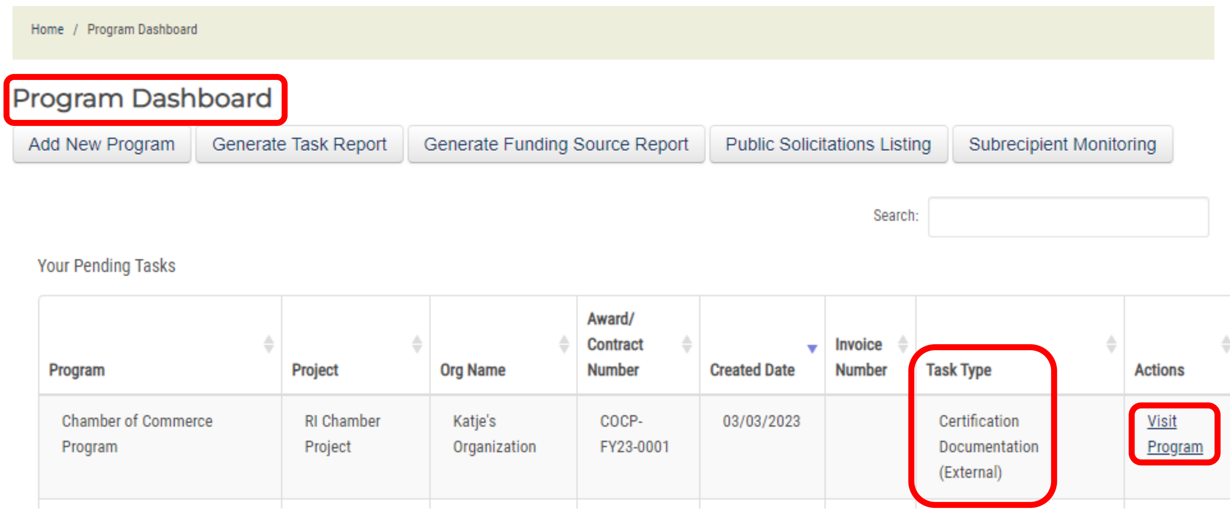
support@ecivis.com

(877) 232-4847, option 2, 8am-5pm PT

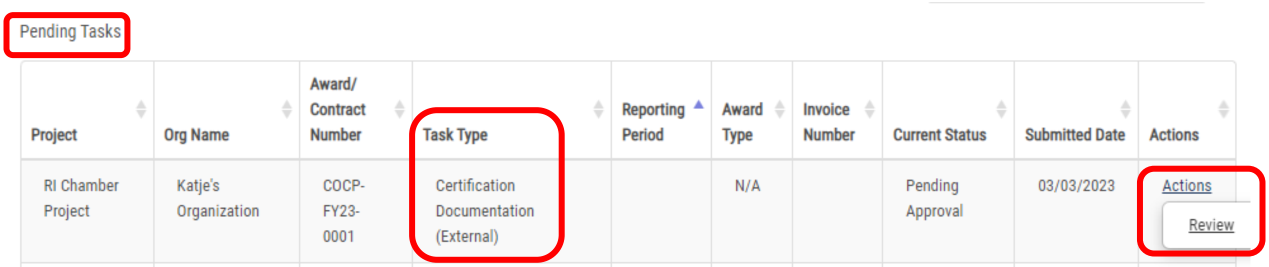
Members of the approval group can also see all pending tasks by navigating to the Subrecipient Management module of eCivis. To do so, hover over the *Grant Management* tab and select *Subrecipient Management*



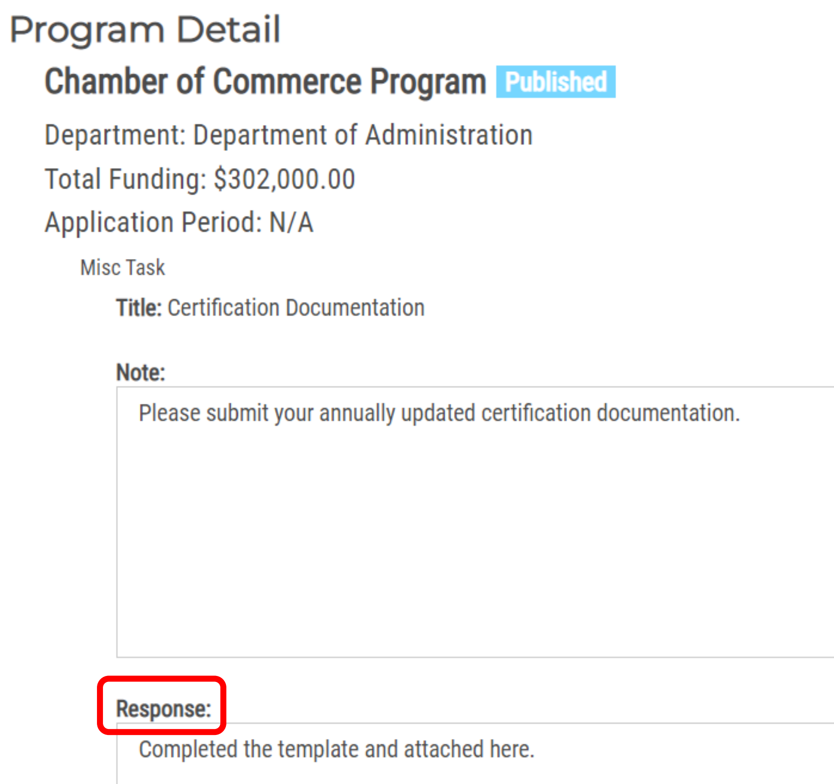
This will open the Grantor Program Dashboard. At the top of the page, the user will see all of their pending tasks. To review and approve an External Miscellaneous Task, locate the task and click *Visit Program*



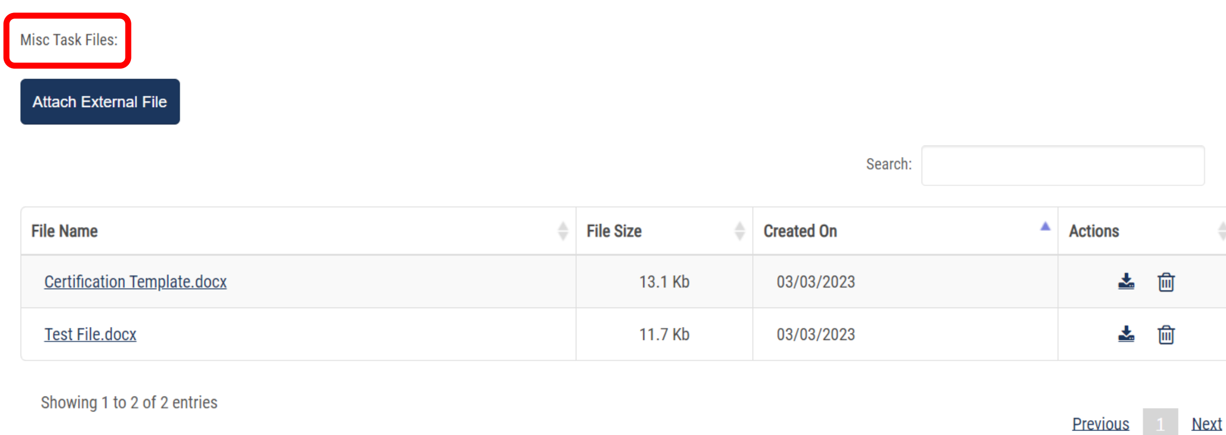
This will open the Program Detail page. From the Program Detail page, an approver can scroll to their Pending Tasks table, click *Actions* and then *Review*



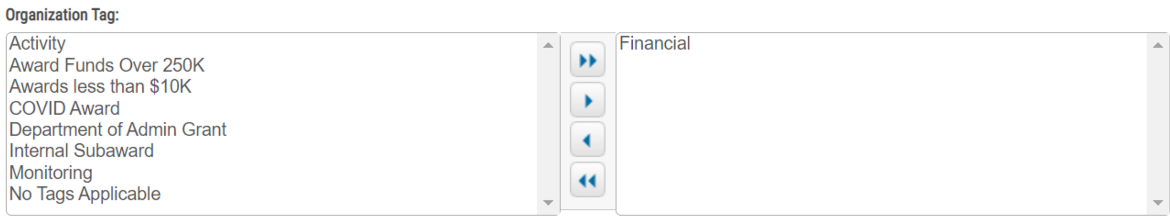
This will open the External Miscellaneous Task response. At the top of the page will be summary information about the subrecipient grant program as well as notes that were initially provided to the subrecipient(s) and the subrecipients response.



Scrolling down, any files uploaded by the user who originally created the External Miscellaneous Task and/or uploaded by the subrecipient during their response will show under *Misc Task Files.* If needed, additional files can be uploaded using the *Attach External File* button. These files will be visible to your subrecipient.



The last section is an optional action to add a tag to the task. This can help flag the Miscellaneous Task as a specific category.



Once reviewed, different actions can be taken:

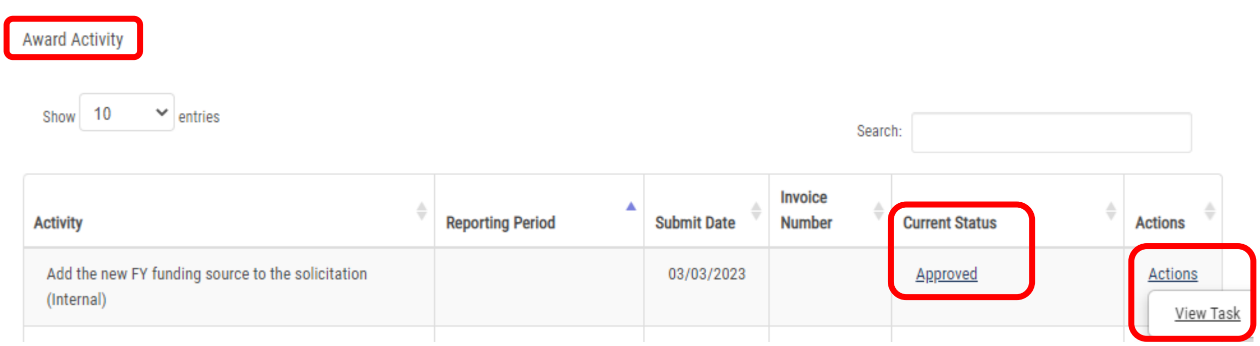
Approve: Approves the External Miscellaneous Task. If you are part of a sequential approval workflow, the approved task will then be sent to the next approver to review. If you are the final user in the approval workflow, the External Miscellaneous Task will be marked “Approved” and the subrecipient will be notified via email.

Return to Task Owner: If you need the subrecipient to edit their response, use this button to provide a note to them and return it for changes. The subrecipient can then edit their response before re-submitting for approval.

Reject: This will reject the task and no further action can be taken on this task. If edits are required, use the *Return to Subrecipient* action instead of *Reject*.

Cancel: This will close out of the task approval.

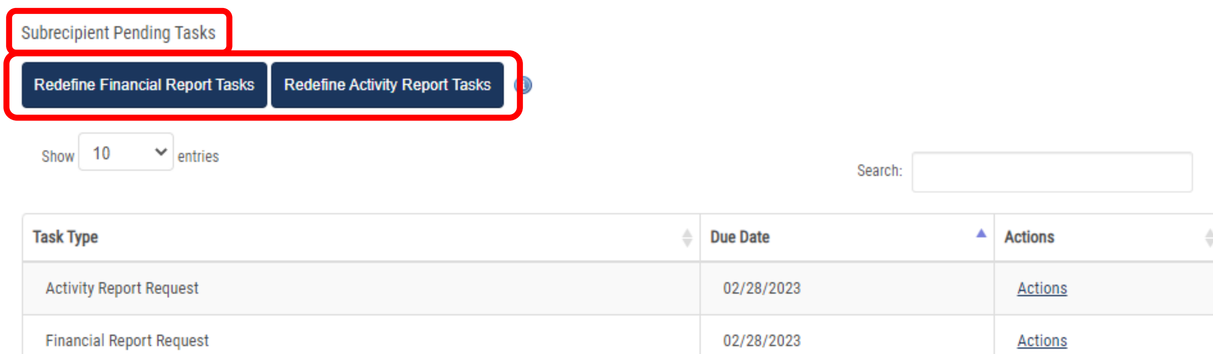
Once the External Miscellaneous Task has been approved, it can be referenced by navigating to the *Subrecipient Detail* page of the subrecipient(s) that were selected when the task was originally created. Clicking *Actions* then *View Task* opens a copy of the approved External Miscellaneous Task.



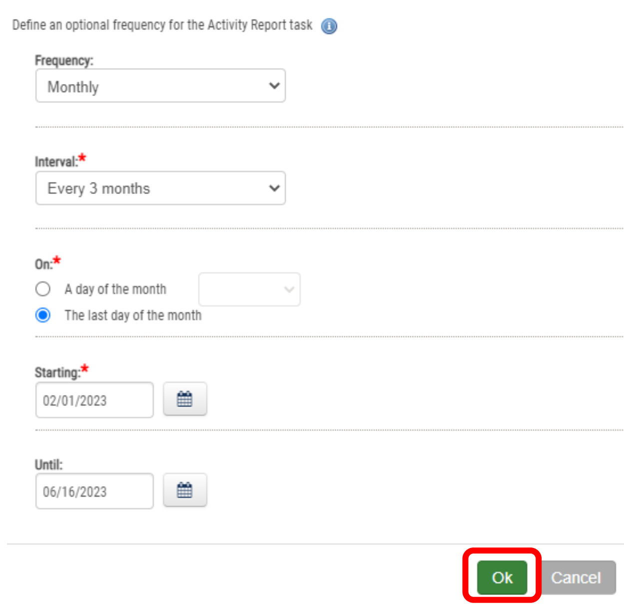
Updating the Subrecipient's Report Task Schedule

Financial Reports and Activity Reports can be scheduled on a cadence for your subrecipient(s) to submit to you. These cadences can be set up in the pre-award stages during solicitation set up and/or during the creation of award recommendations. Additionally, the frequency or intervals between each Financial Report and/or Activity Report can be edited at any time. If you are changing the frequency of reports from what was required in the Subaward Agreement, or to remove a Special Condition in the Subaward Agreement, completing a [Grantor Initiated Amendment](#) is highly recommended.

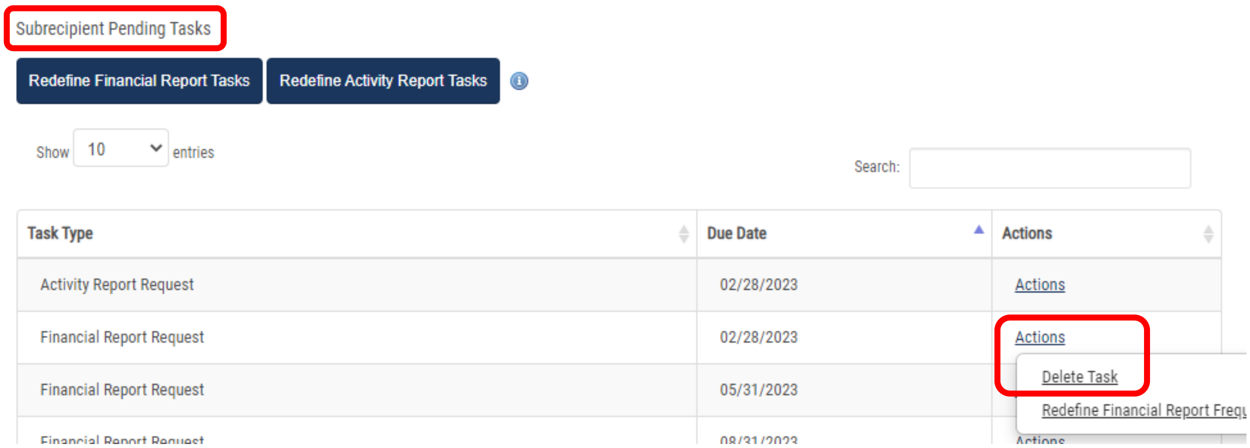
To edit the frequency of these report requests, navigate to the *Subrecipient Detail* page. Scroll down to the *Subrecipient Pending Tasks* section. Here you can view the table of the current request schedule. Click on *Redefine Financial Report Tasks* to edit the frequency of Financial Reports (Payment Requests) or *Redefine Activity Report Tasks* to edit the frequency of Activity Reports.



This will open the current frequency/interval for you to edit. Note: this will only edit this subrecipient's reporting schedule, not all subrecipients under this grant program. Click *Ok* to save changes and update their reporting schedule. Changes will automatically be reflected in the subrecipient's eCivis Portal as well.



To delete tasks from the *Subrecipient Pending Tasks* table, click *Actions* then *Delete Task*



Subrecipient Monitoring

State agency grantors have a responsibility to ensure that pass-through funds granted to subrecipients are used appropriately and in accordance with the terms of the subaward agreement. The Subrecipient Monitoring tool built into eCivis allows you to schedule site visits, request reports and documentation, identify concerns, create a Corrective Action Plan (CAP) and more. For more information on subrecipient monitoring and step-by-step instructions on how to perform monitoring in eCivis, reference the Subrecipient Monitoring Guide.

Pulling Reports on Subrecipient Information and Progress

Reports can be pulled from eCivis to provide you information on a variety of data points regarding your subrecipients. This includes, but is not limited to:

- Summary contact information and award data for your subrecipient(s)
- Funding source data for each subrecipient and each subrecipient grant program
- Summary and detailed information on submitted and outstanding tasks
- Detail on payments to subrecipient(s)
- Aggregated data at the subrecipient budget category level
- Summary of subrecipient goal/subgoal progress

For more information on subrecipient reporting and instructions on how to pull different reports, reference the RI Guide to GMS Reports document.

Award Closeout Process

When your subrecipient(s) have submitted their final Financial Report (Payment Request) and are ready to close out their grant, they will initiate the closeout process. The final task for the state agency is to approve the Closeout Financial Report (Payment Request).

When a subrecipient submits a Closeout Financial Report, the user(s) in the Closeout Approval Workflow will be notified via email that they have a pending task to review. For more information on setting up and editing approval workflows, reference the [Grantor Approval Workflow]() user guide, and/or the training video [Approval Tab of the Solicitation](). An example of the automatic email sent to Closeout Approval Workflow members is below:

eCivis

An approval task has been created that requires your attention in eCivis Grants Network.

Program:	Chamber of Commerce Program
Project:	DTA 02092023
Award/Contract Number:	
Subrecipient:	Katje's Organization
Task Type:	Financial Report Approval
Approval Type:	Sequential Group
Review Comment:	

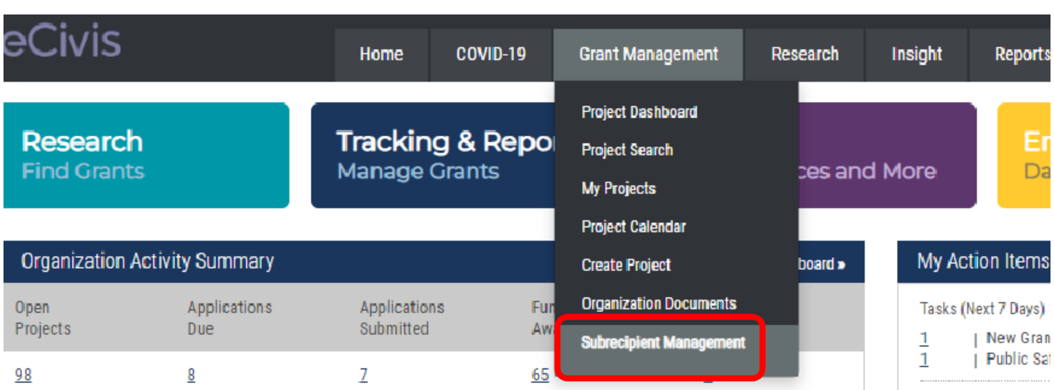
Sincerely,

The eCivis Support Team

support@ecivis.com

(877) 232-4847, option 2, 8am-5pm PT

Members of the approval group can also see all pending tasks by navigating to the Subrecipient Management module of eCivis. To do so, hover over the *Grant Management* tab and select *Subrecipient Management*



This will open the Grantor Program Dashboard. At the top of the page, the user will see all of their pending tasks. To review and approve a Closeout Financial Report, locate the task and click *Visit Program.*

Program Dashboard

Add New Program | Generate Task Report | Generate Funding Source Report | Public Solicitations Listing | Subrecipient Monitoring

Search:

Your Pending Tasks

Program	Project	Org Name	Award/ Contract Number	Created Date	Invoice Number	Task Type	Actions
Chamber of Commerce Program	DTA 02092023	Katje's Organization		03/03/2023		Financial Report Approval (Closeout)	Visit Program

This will open the Program Detail page. From the Program Detail page, an approver can scroll to their Pending Tasks table, click *Actions* and then *Review*

Pending Tasks

Project	Org Name	Award/ Contract Number	Task Type	Reporting Period	Award Type	Invoice Number	Current Status	Submitted Date	Actions
DTA 02092023	Katje's Organization		Financial Report Approval (Closeout)	02/01/2023 - 02/28/2023	N/A		Pending Approval	03/03/2023	Actions Review

This will open the Closeout Financial Report for an approver to review. At the top of the page is the Subrecipient Detail information. This is summary information about the subrecipients award. A note will also be included identifying this report as a Closeout Report.

Subrecipient Detail

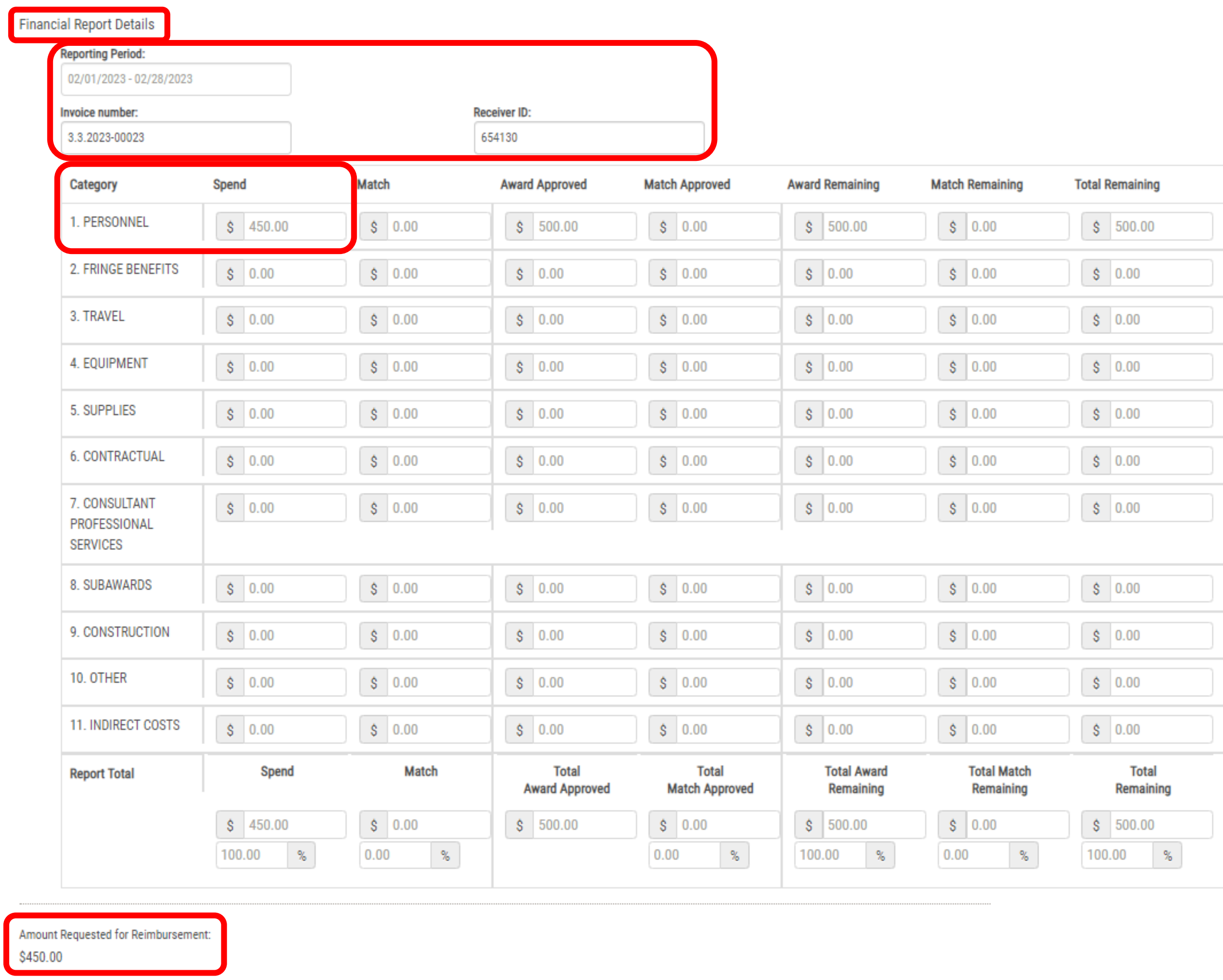
Award Detail

Subrecipient: A New Leaf - 124 Main Street
Vendor ID: 85-963
Organization: Katje's Organization
Project: DTA 02092023
Award Manager: K. Benoit
Award Status: Closeout
Approval Date: 03/03/2023
Approved Amount: $500.00 +
Total Federal Award: $0.00
Total Other Award: $500.00
Total Match: $0.00
Performance Period: 02/01/2023 - 02/28/2023

Program: Chamber of Commerce Program
Award Type: N/A

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

Scrolling down, in the Financial Report Details section, the reporting period and the amount requested from each budget category will be shown for that invoice.


Financial Report Details

Reporting Period:
02/01/2023 - 02/28/2023

Invoice number:
3.3.2023-00023

Receiver ID:
654130

Category	Spend	Match	Award Approved	Match Approved	Award Remaining	Match Remaining	Total Remaining
1. PERSONNEL	$ 450.00	$ 0.00	$ 500.00	$ 0.00	$ 500.00	$ 0.00	$ 500.00
2. FRINGE BENEFITS	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
3. TRAVEL	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
4. EQUIPMENT	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
5. SUPPLIES	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
6. CONTRACTUAL	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
7. CONSULTANT PROFESSIONAL SERVICES	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
8. SUBAWARDS	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
9. CONSTRUCTION	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
10. OTHER	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
11. INDIRECT COSTS	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
Report Total	Spend	Match	Total Award Approved	Total Match Approved	Total Award Remaining	Total Match Remaining	Total Remaining
	$ 450.00	$ 0.00	$ 500.00	$ 0.00	$ 500.00	$ 0.00	$ 500.00
	100.00 %	0.00 %		0.00 %	100.00 %	0.00 %	100.00 %

Amount Requested for Reimbursement:
$450.00

Before an invoice is approved, a state agency approver needs to input the Invoice Number and Receiver ID fields.

Invoice Number: A unique invoice number needs to be inputted by agency staff before it is approved and sent to RIFANS. Invoice approval will stop at RIFANS if the GMS invoice number field is left blank, if the invoice number is not unique to the subrecipient, or if there are additional spaces inputted after the invoice number. An example of a unique invoice number could be Grant Agreement number-date approved (e.g., DOA-22-0001-06012022)

Receiver ID: In this field, enter the applicable RIFANS Natural Account code. If left blank, it will default in RIFANS to Natural Account 654130, which is the subaward natural.

Review the dollar amounts requested by the subrecipient in each budget category. The total amount requested will also appear in the “Amount Requested for Reimbursement” field. Ensure that the *Total Spend* field and the *Amount Requested for Reimbursement* field are the same.

Below the detailed budget is the Allocation section. In this section, allocate how much funding from each funding source (if more than one) should be used to pay this invoice. The *Allocation Total* needs to be the same amount as the *Amount Requested for Reimbursement.* If the amounts are different, the system will not let you approve and move the Closeout Financial Report (Payment Request) to the next stage.

Amount Requested for Reimbursement:
$450.00

Allocate Funding:

	Program Funding Available	Allocation Approved	Allocation Available	Amount
US17538 American Rescue Plan Act Economic Adjustment Assistance (ARPA EAA) - FY 2021	$ 1,050.00	$ 0.00	$ 0.00	$ 0.00
Demo General Fund FY2022	$ 294,500.00	$ 500.00	$ 50.00	$ 450.00
Allocation Total				$ 450.00

The next section of the report is to review the narrative and any files that have been submitted as backup documentation along with their request. You can click on the hyperlinked “File Name” or click the download icon to download and view the documentation submitted by the subrecipient:

Financial Report Narrative:

Final payment request. Only $450 of our $500 award was spent.

Financial Report Files:

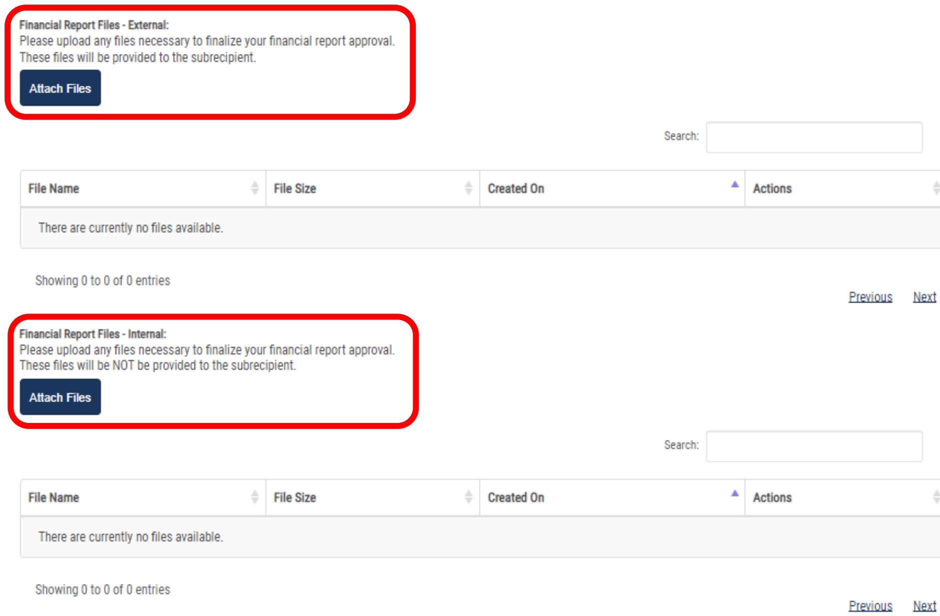
Search:

File Name	File Size	Created On	Actions
Test File.docx	11.7 Kb	03/03/2023	

Showing 1 to 1 of 1 entries

Previous 1 Next

The next section of the report allows the state agency to attach any files necessary to the Closeout Financial Report before approving. Files uploaded in the *Financial Report Files – External* section will be visible to the subrecipient, and files uploaded in the *Financial Report Files – Internal* section will not be visible/provided to the subrecipient but kept on record for agency viewing/reference.



The last section of a Closeout Financial Report is to provide a *Closeout comment* to your subrecipient. The subrecipient will see this comment in the email automatically sent to them once their Closeout Financial Report is approved.

Once everything in the submitted Closeout Financial Report (Payment Request) has been reviewed, different actions can be taken:

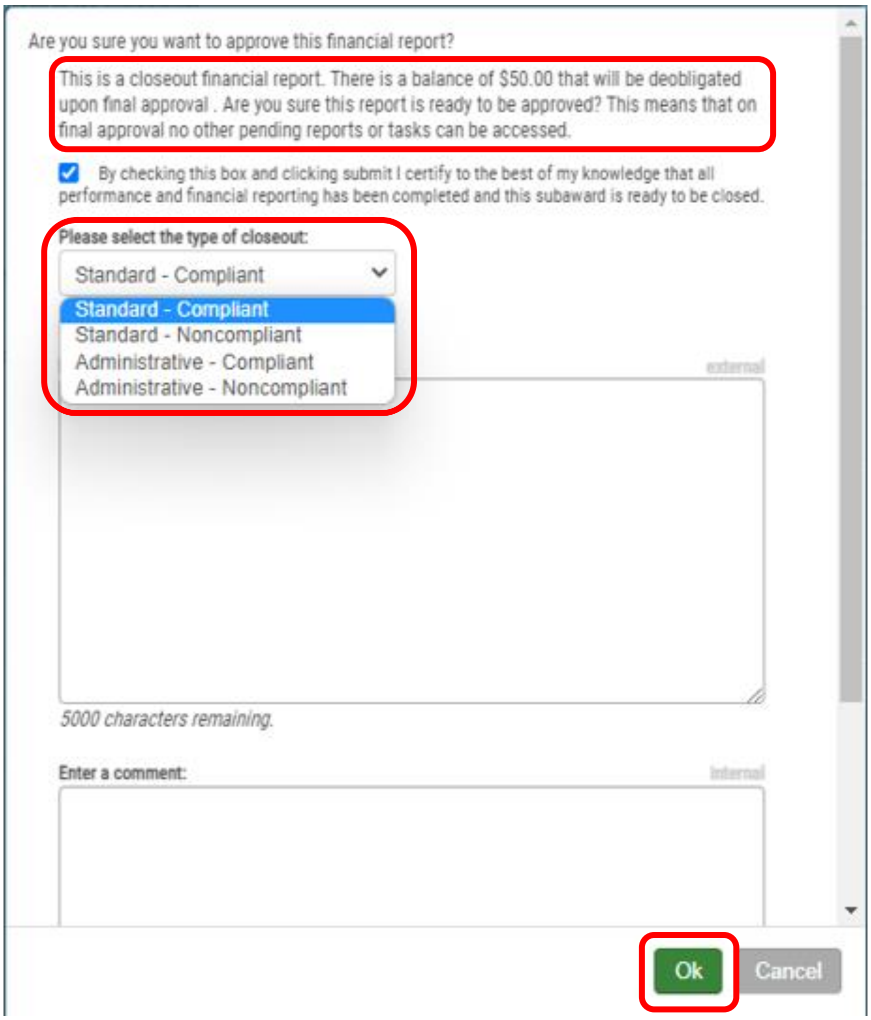
Save: This will save any changes that have been made to the report while approving. Saving the report allows you to close out of the page and come back to finish reviewing/approving at a later date.

Return to First Approver: This button will only appear if the Closeout Approval workflow is sequential. Use this button if you need a previous approver to modify the report, and the subrecipient does not need to make any changes. You will be required to enter in a note explaining what modifications are being requested of the first approver.

Return to Subrecipient: If you need the subrecipient to make changes to the report (edit the amounts requested, attach additional back up documentation, edit their narrative, etc.) then use the Return to Subrecipient button. This will return the Closeout Financial Report back to the subrecipient where they can edit the report before resubmitting to you. Once they resubmit, the report will re-enter the Closeout Approval workflow.

Approve: This will approve the report. Before approving, make sure that the Invoice Number, Receiver ID, and Allocation Amount fields are completed. If you are part of a sequential approval workflow, the approved report will then be sent to the next approver to review. If you are the final user in the approval workflow, the approved report will be marked “Approved / Awaiting Payment.” Closeout Financial Reports in the “Approved / Awaiting Payment” status will be sent to RIFANS that night where the invoice will be created and enter your agencies existing approval workflow for that line sequence.

When you click *Approve,* you'll receive a pop-up notifying you of any funds that were unspent and will be de-obligated at the time the report is approved. (The subrecipient sees a similar message before they submit.) A type of closeout should also be selected from the dropdown to categorize the closeout. Boxes are available to enter an external and/or internal comment about the approval. Once complete, click *Ok.*



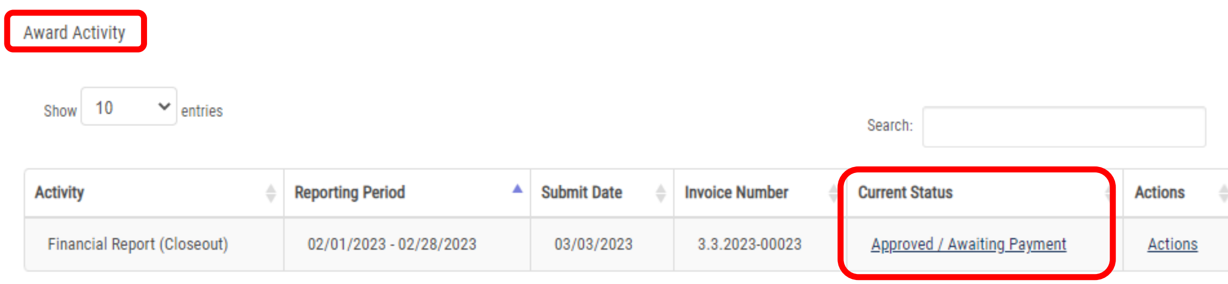
Standard – Compliant: The subrecipient initiated closeout by submitting their final report. The grantor agency has determined that all applicable administrative actions and all required work of the subaward have been completed by the subrecipient. Most common.

Standard – Noncompliant: The subrecipient initiated closeout by submitting their final report. Despite an outstanding compliance issue, the grantor agency determines the subaward may be closed. Rarely used.

Administrative – Compliant: Closeout is initiated by the grantor agency. The subrecipient has submitted all required reports, and no final financial report is required.

Administrative – Noncompliant: Closeout is initiated by the grantor agency. The subrecipient is non-responsive and has not submitted all reports in accordance with the terms and conditions of the subaward. The grantor agency has exhausted all reasonable efforts to engage the subrecipient. The grantor agency should consider any subrecipients with *Administrative – Noncompliant Closeouts* to be high risk.

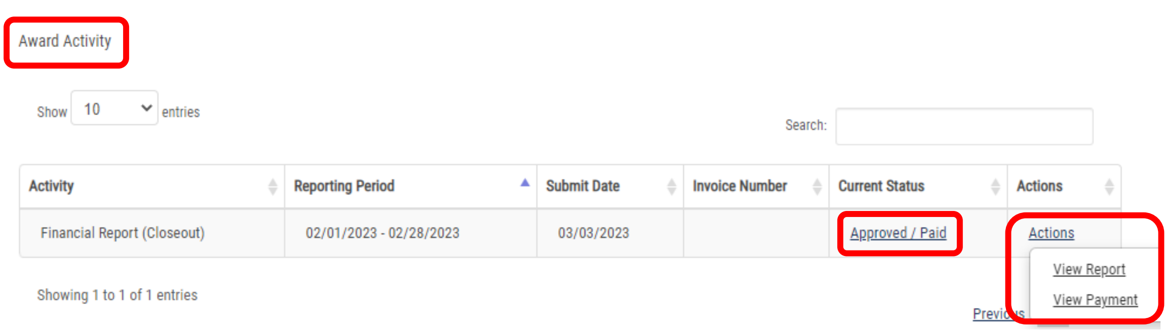
Once all approvers in the Closeout Approval workflow have approved a Closeout Financial Report (Payment Request), the report will move to the status "Approved / Awaiting Payment." The subrecipient will also receive an email notifying them that their award has been successfully closed. In their eCivis Portal, they will see the "Approved / Awaiting Payment" status as well.



Closeout Financial Reports in the "Approved / Awaiting Payment" status will be sent to RIFANS that night where the invoice will be created and enter your agency's existing approval workflow for that line sequence.

If there is someone in the RIFANS approval workflow that is not part of the GMS approval workflow, that needs to see the submitted invoice in eCivis or the backup documentation, then they will need to be added to eCivis with the user role "RIFANS Approver." All new user requests should be submitted through the GMS Support Form. Instructions for RIFANS Approvers to navigate to an approved invoice in eCivis can be found by hovering over the *Grant Management* tab and selecting *Organization Documents.* Reference the document titled "RIFANS Users – Reviewing Invoices & Backup Documentation in eCivis."

Once an invoice has been approved in both eCivis and RIFANS, it will be paid. Payment information will be automatically sent from RIFANS to eCivis and the subrecipient Closeout Financial Report will move to the status "Approved / Paid." To view a copy of the report, click on *Actions* then *View Report* to open a view-only version of the approved report. To view payment information, click on *Actions* then *View Payment.*



Closed subawards can always be viewed by navigating to the *Program Detail* page and scrolling down to *Subrecipient Awards.* Closed subawards will still be listed in the *Subrecipient Awards* table with the *Status* listed as *Closed.* To view reports, budgets, documentation, etc. previously submitted by the subrecipient during their performance period, click on the hyperlinked *Project* name.

Subrecipient Awards

Project	Organization	Award Manager	Award/ Contract Number	Award Type	Status	Contract Start	Contract End	Total Award
DTA 02092023	Katje's Organization	K. Benoit		N/A	Closed	02/01/2023	02/28/2023	$450.00

This will open the *Subrecipient Detail* page where every report submitted by the subrecipient can be viewed.