



Adding and Assigning Reviewers

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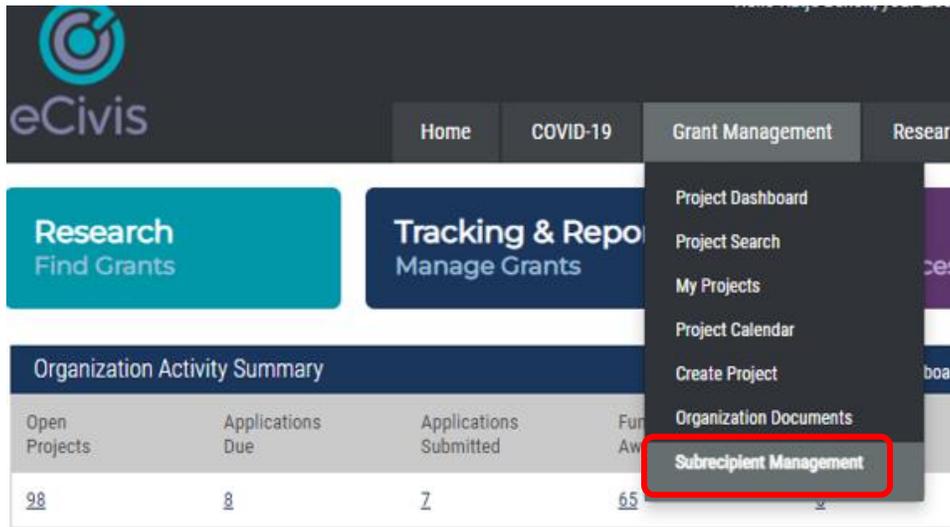
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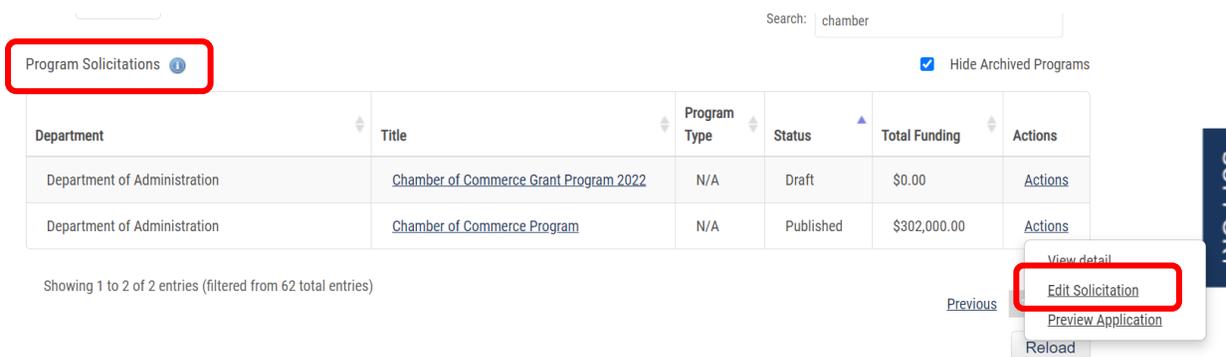
Adding Reviewers

Once you have identified who will be on your review committee, you will need to add them to the Review tab of your solicitation before you can start assigning reviews to them. Review committee members do not need to be a state agency user or have an eCivis license. The only information needed before adding your reviewers is their first name, last name, and email address. Review Committee members can be added to your solicitation at any time, even after it has been published.

To do so, navigate to the grantor program dashboard by hovering over the *Grant Management* tab and selecting *Subrecipient Management*.



Scroll down to the list of Program Solicitations and locate your program. Click on the *Actions* column and *Edit Solicitation*.





Once in your Solicitation Edit page, navigate to the *Review* tab. Click on *Add Reviewer*.

Solicitation Edit

✖ = Incomplete ✔ = Complete

Overview ✔	Eligibility ✔	Financial ✔	Contact ✔	Files ✔	Review ✔	Submission ✔	Goals ✔	Approval ✔
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Please enter review committee members:

Review Committee

No data available in table

Step 6 of 9 * = Required for Section Completion

Review notes may be used to provide instructions to your customer service representative that will help them in designing the application and submission process for your solicitation. Once you have marked your solicitation complete, your customer service representative will follow up within one business day to confirm your program details. These notes will not appear to applicants.

Source [Icons] B I U [Icons]

Add Reviewer >

In the *Add Reviewer* pop-up, enter in their First name, Last name, and email address. Once entered, click *Add Reviewer*.

Add Reviewer [Close]

First Name: *

Last Name: *

Email: *

Add Reviewer > **Close** >

You will then see that member added to the *Review Committee* table. Repeat this process for each member of your review committee.

Please enter review committee members:

Review Committee			
Katje	Benoit	Test@test.com	✖

Add Reviewer >



Once you have added all review committee members, click Save on the *Review* tab of the solicitation.

incomplete complete

Overview ✓	Eligibility ✓	Financial ✓	Contact ✓	Files ✓	Review ✓	Submission ✓	Goals ✓	Approval ✓
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Step 6 of 9 * - Required for Section Completion

Please enter review committee members:

Review Committee

Katje Benoit Test@test.com

[Add Reviewer](#)

Review notes may be used to provide instructions to your customer service representative that will help them in designing the application and submission process for your solicitation. Once you have marked your solicitation complete, your customer service representative will follow up within one business day to confirm your program details. These notes will not appear to applicants.

Source B I U [List Icons] [Link Icon]

Use the tabs to complete the solicitation. Make sure to click Save when making changes.

[Save](#) [Done](#)



Assigning Reviewers to Applications to Review

Once you have added the members of your review committee to the Review tab of your solicitation, you can assign them to review submitted applications. The assignment of applications to review committee members occurs in your Zengine Application Workspace. To get there, go to the Program Detail page of your program, and click the *Application Workspace* button.

Program Detail

Test - US14067 Business Physical Disaster Loans - FY 2022 Published

Department: Department of Administration

Total Funding: \$400,000.00

Application Period: 09/30/2022 - 09/06/2029

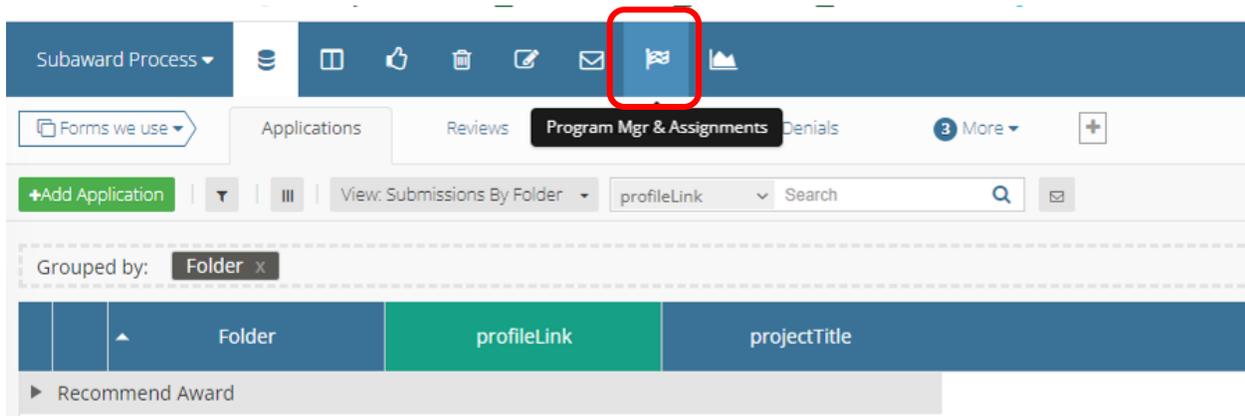


Award Recommendation Approval

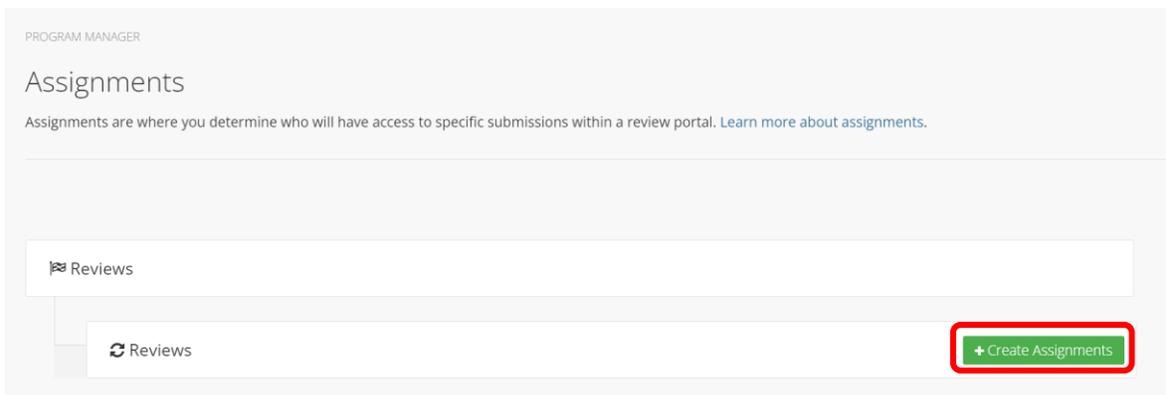
You currently have no pending recommendation approvals. Click the reload button to refresh.

Reload

When your application workspace opens up, click on the checkered flag icon for *Program Mgr & Assignments*.



On the Assignments page, click on the green *+Create Assignments* button





From this page, you will make your assignments. There are 4 different methods for assigning reviewers to application submissions:

1. Assign by Submission
2. Assign by Submission Group
3. Assign by Member
4. Batch Assign

You can choose the assignment method by clicking on the drop-down menu

A screenshot of a web application interface. At the top left, there is a "Back" button with a left-pointing arrow. Below it, the heading "Reviews" is displayed, followed by the subtext "PART OF THE PROGRAM: REVIEWS". A dropdown menu is open, showing four options: "Assign by Submission" (highlighted with a red square), "Assign by Submission Group", "Assign by Member", and "Batch Assign". To the right of the dropdown, there is a "All" filter button. Below these elements is a table with columns for "# COMPLETED" and "% COM". The table contains one row with the text "Nov2 Training Test" and the number "2".

	# COMPLETED	% COM
Nov2 Training Test	2	0



Assign by Submission

Assign by Submission allows you to view all submitted applications and assign members to each one. The submissions list on the left will list the submitted applications. You can also search for a specific submission by name or use the filter tool.

Assign by Submission ▾

Q Search Submissions ▼ All ▾

SUBMISSION ▾	# ASSIGNMENTS ▾	# COMPLETED ▾	% COMPLETED ▾
let's try this again	1	0	0%
Nov2 Training Test	2	0	0%

← Select a submission from the left to see associated members.

Click on the title of the submission you want to assign a review committee member to, and then click the green *Assign* button. The drop-down list will show the reviewers that were added to the *Review* tab of your solicitation. Select which reviewer(s) you want to have access to review this application submission from the drop-down.

Assign by Submission ▾

Q Search Submissions ▼ All ▾

SUBMISSION ▾	# ASSIGNMENTS ▾	# COMPLETED ▾	% COMPLETED ▾
let's try this again	1	0	0%
Nov2 Training Test	2	0	0%

let's try this again Assign ▾

MEMBERS STATUS

Enter the name of a member ...

Benoit , Katje

Smith , Stephen

Once you select a reviewer from the drop-down, you will see them listed in the table on the right, along with the status of their review (Not begun, In progress, or Submitted). To add more reviewers to this specific application submission, click the green *Assign* button again. To remove reviewers from having access to this application submission, click the grey X next to their name.

Assign by Submission ▾

Q Search Submissions ▼ All ▾

SUBMISSION ▾	# ASSIGNMENTS ▾	# COMPLETED ▾	% COMPLETED ▾
let's try this again	1	0	0%
Nov2 Training Test	2	0	0%

let's try this again Assign ▾

MEMBERS (1)	STATUS	ASSIGNED
Benoit , Katje	○ Not Begun	Manually ✕

Continue this process by clicking on the other application submissions and assigning reviewers to each.



Assign by Submission Group

The Assign by Submission Group option will help you assign all submitted applications to be reviewed by selected review committee members. As new applications are submitted by entities, they will be automatically assigned to your selected review committee members.

Assign by Submission Group

Group Name

GROUP NAME	# SUBMISSIONS	# MEMBERS
All Submissions	2	0

Select a group from the left to see associated reviewers.

Click on the Group Name *All Submissions*. On the left, you will see a drop-down where you can assign review committee members to have access to and review all application submissions.

Assign by Submission Group

Group Name

GROUP NAME	# SUBMISSIONS	# MEMBERS
All Submissions	2	0

All Submissions

MEMBERS (0)

Enter the name of a member ...

- Benoit, Katje
- Smith, Stephen

Assign

Once selected, you will see the list of review committee members that are assigned to review all application submissions, and their % complete. To remove a member from this group, click the grey X next to their name.

Assign by Submission Group

Group Name

GROUP NAME	# SUBMISSIONS	# MEMBERS
All Submissions	2	2

All Submissions

MEMBERS (2)

% REVIEWED

Benoit, Katje	0%	X
Smith, Stephen	0%	X



Assign by Member

The Assign by Member option is similar to the Assign by Submission option, but you will see the review committee members on the left, and assign them to specific application submissions on the right. You can also search for a specific submission by name or use the filter tool.

The screenshot shows the 'Assign by Member' interface. At the top, there is a dropdown menu labeled 'Assign by Member'. Below it is a search bar for members and a filter dropdown set to 'All'. A table lists members with their assignment statistics:

MEMBER	# ASSIGNMENTS	# COMPLETED	% COMPLETED
Benoit , Katje	2	0	0%
Smith , Stephen	1	0	0%

To the right of the table, a text box says: 'Select a member from the left to see associated submissions.'

Click on the review committee member you want to assign applications to, and then click the green *Assign* button. The drop-down list will show the titles of submitted applications that are ready to be reviewed. Select which applications you want this reviewer to have access to from the drop-down.

This screenshot shows the 'Assign by Member' interface with 'Benoit , Katje' selected in the table. A green 'Assign' button is highlighted. To the right, a dropdown menu for 'SUBMISSIONS' is open, showing a search bar and a list of submissions:

- let's try this again
- Nov2 Training Test

You can then see which submissions that review committee member has access to on the right, along with the status of their review (Not begun, In progress, or Submitted). You can assign additional applications for this reviewer to review by clicking the green *Assign* button again. To remove this reviewer's access to a certain application, click the grey X next to the submission name.

This screenshot shows the 'Assign by Member' interface with 'Benoit , Katje' selected. The 'SUBMISSIONS (1)' list is expanded to show details for 'Nov2 Training Test':

SUBMISSIONS (1)	STATUS	ASSIGNED
Nov2 Training Test	Not Begun	Manually

A grey 'X' icon is visible next to the submission name, indicating it can be removed from the list.

Continue this process by clicking on the other review committee members and assigning submissions to each.



Batch Assign

Batch Assignments are used to speed up the process of manually assigning reviewers to submissions.

A screenshot of a web application interface for creating a batch assignment. At the top left, there is a tab labeled "Batch Assign" with a dropdown arrow. Below the tab, the heading "Create a Batch Assignment" is followed by the instruction "This batch assignment is intended for:". There are three input fields: a dropdown menu with the placeholder text "Click to view submission groups...", another dropdown menu with the placeholder text "Assign By...", and a text input field with the placeholder text "# of ...". Below these fields, there is a checkbox labeled "Limit to specific reviewers:" which is currently unchecked. At the bottom left of the form area, there is a blue button labeled "Assign".

From the dropdowns, select All Submissions, choose to assign by reviewer or by entry (submission) and the number of entries per.

If Assign by Reviewer is chosen, then choose the number of entries (submissions) that each reviewer should be assigned to.

If Assign by Entry is chosen, then choose the number of reviewers that should be assigned to each submission.

A detailed view of the "Batch Assign" form. The heading "Create a Batch Assignment" is followed by "This batch assignment is intended for:". The first dropdown menu is set to "All Submissions". The second dropdown menu is set to "Entry". The text input field contains the number "4". Below these fields, the checkbox "Limit to specific reviewers:" is now checked. Underneath, there are two unchecked checkboxes: "Thompson , Steve" and "Smith , Stephen". At the bottom, there is a blue button labeled "Assign".

You can further limit the reviewers that can receive a batch assignment. This can be useful if you need to limit a batch assignment to a specific committee.

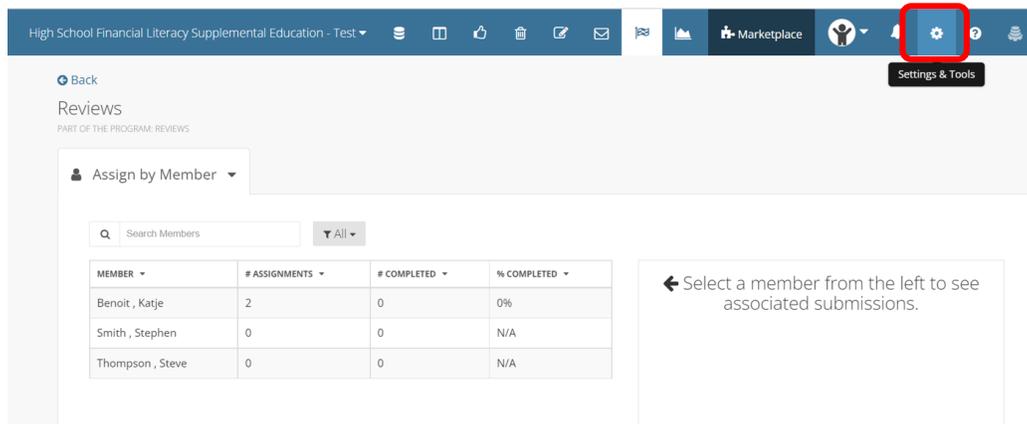
Click *Assign* once your selections have been made.



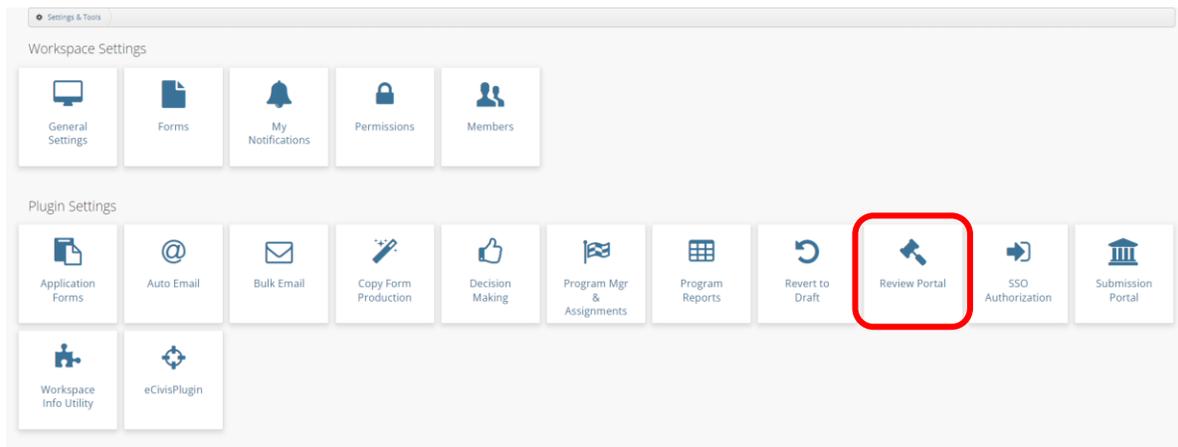
Accessing the URL that needs to be sent to Review Committee Members

All reviews of applications will be completed and submitted through an online review portal. The state agency program manager will need to send out the unique URL to the review portal to members of the review committee so they can access the portal. Through the review portal, reviewers can then access copies of the applications and the reviewer feedback form that needs to be completed and submitted.

Once review assignments have been made in Zengine, navigate to the *Settings & Tools* icon in the upper right corner



Under plugin settings, select the *Review Portal* tile

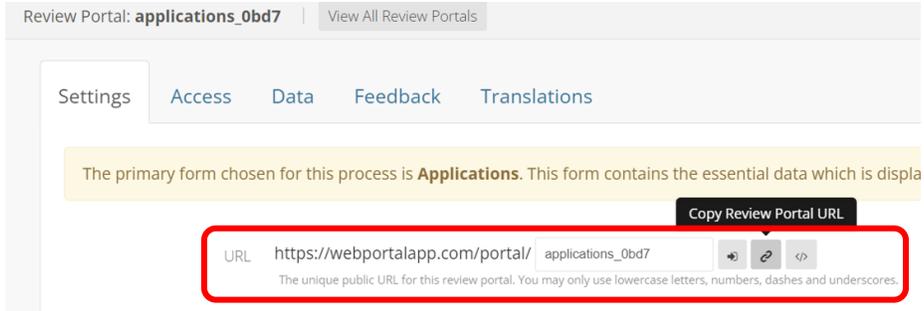


Click the edit icon for your review portal





From this page you can copy and paste the unique URL for the review portal



You will need to send this unique URL to your reviewers. From this URL, reviewers that were assigned to applications can log in and access the review portal to complete and submit their reviews.

You may also want to share the links to the user guide and training video on “Completing a Review,” available at [GMO’s Resources for State Agencies website](#).