

RI-Specific: Subrecipient Post-Award Management

This user guide walks through the different actions a subrecipient can take in eCivis Portal to manage an award after it has been accepted. For instructions on submitting an application and accepting an award, visit: https://controller.admin.ri.gov/grants-management/grant-management-system-gms/subrecipients/resources-applicants-subrecipients

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Overview of Award Dashboard

When you are logged into your eCivis Portal, navigate to the *My Awards* tab to view all of your awards and their current status. Clicking on the hyperlinked *Grant Title* brings you to that respective Award Dashboard.

o eCivis									🗭 Log out
希 My Applications									
🖤 My Awards	My Awards								~
🌢 My Profile	Show 10	✓ entries					Search:		
	Grant Title 🎝	Project Title ↓†	Award/Contract Number	Award Type ↓↑	Award Status 🎝	Notification Date 1	Performance Period 1	Role ↓↑	Actions
	Direct Award Test	Direct ward Test	RI-2022-1234	N/A	Awarded	08/08/2022	8/1/22 - 7/31/23	Owner	≡
	Healthy Schools **DEMO	lealthy School App	N/A	N/A	Awarded	10/06/2020	11/1/20 - 11/7/20	Owner	≡

At the top of your *Award Dashboard* you will see generic details about your award such as performance period, award amount, award contract number, etc. You will also see buttons for the different options of managing your award. To see a view-only copy of your award budget, goals, or files associated with your award, click on the respective buttons. The remainder of the button options will be explained in this document.

Award D	ashboard	k				
Award Detail	View Budget	View Goals	View Files	Submit Financial Report	Submit Activity Report	Request Grant Amendment
					Award Close	out Manage Project Team
Subrecipient: Project: Goals Tes Award Status: Aw Approval Date:08 Approved amoun Total Non-F	/arded 3/31/2022	00	Program: Dire	ect Award Test2		
Total Match:\$0.00 Performance per) iod: 08/11/2022 - 06	/01/2023				



Scrolling down on your Award Dashboard, you will next see your Pending Tasks. Pending tasks include all Financial Reports (Payment Requests), Activity Reports, and Miscellaneous Reports that have been assigned to you by your grantor with their due dates. You can review when the tasks were created/assigned and when they are due. Clicking on the *Actions* icon allows you to start working on the task or mark it complete.

Pending Tasks			~
Show 10 v entries		Search:	
Task Type	Date Created	Due Date 🗍	Actions 🗍
Activity Report Request	08/08/2022	03/25/2023	=
Activity Report Request	08/08/2022	12/25/2022	=
Activity Report Request	08/08/2022	04/25/2023	=
Financial Report Request	08/08/2022	04/05/2023	=
Activity Report Request	08/08/2022	10/25/2022	=
Financial Report Request	08/08/2022	06/05/2023	=
Financial Report Request	08/08/2022	05/05/2023	=

Scrolling to the next section of your Award Dashboard, you will see your Award Activities. Initially, this section will be blank but as you submit tasks to your grantor, they will be saved here along with their current status. Clicking on the hyperlinked *Current Status* will show you additional details of where your task is in the approval workflow. Clicking on the hyperlinked *View Report* will open a copy of the report that was submitted to your grantor.

now 10 v entr	ies					Search:	
Report 🗍	Reporting Period	1t	Created By	Ļ	Date Created	Current Status	Actions 4
Financial Report	09/09/2022 09/19/2022		Katje Benoit		08/11/2022	Approved / Awaiting Payment	View Report
Financial Report	08/08/2022 09/21/2022		Katje Benoit		08/11/2022	Approved / Awaiting Payment	View Report
Financial Report	08/18/2022 09/01/2022		Katje Benoit		08/11/2022	Approved / Awaiting Payment	View Report

Reload



Scrolling down to the final section of your Award Dashboard is the Award Amendments section. If you ever need to request an amendment (change your performance period, request a budget change, request a goal target unit change, etc.) you will use the *Grant Amendment* functionality. All grant amendments that have been submitted to your grantor will show here along with their status and a copy of the changes requested. Grant Amendments initiated by your grantor agency will also be listed in this section.

Award Amendments				l	Request Grant Amendment
Show 10 ~ entries				Search:	
Created Date	↓ <u>≞</u>	Status	ļ†	Actions	ţ1
	No amendmen	nts have been reques	ted for this award.		
Showing 0 to 0 of 0 entries					Previous Next
					Reload



Adding Team Members to a Grant Award

The user that accepted the grant award will have the user role "Owner" and may add team members to their awarded grant in eCivis Portal. All team members have the same level of access to view and submit reports to the Grantor, however, only the Award Owner can add additional team members.

Once logged into eCivis Portal, click on *My Awards* and locate the grant you want to add team members to. Click on the hyperlinked *Grant Title*.

o eCivis	Ξ										🕩 Log
希 My Applications											
🕈 My Awards	My Awards										
My Profile	Show 10	✓ entries							Search:		
	Grant Title ↓↑	Project Title ↓†	Award/Contract Number		ward ∕pe ↓↑	Award Status	11	Notification Date J1	Performance Period	Role ↓↑	Actions
	Direct Award Test	Direct Award Test	RI-2022-1234	N	/A	Awarded		08/08/2022	8/1/22 - 7/31/23	Owner	≡

This opens your Award Dashboard. Click on Manage Project Team.

Award Dashboard	d						
Award Detail	View Budget	View Files	Submit Financial Report	Submit Activity Report	Request Grant Amendment	Award Closeout	Manage Project Team
Subrecipient: Direct Award Test Org Project: Direct Award Test	anization		Program: Direct Award Test Award ID: RI-2022-1234				

On the Project Team page, select Add Team Member.

Project Team							
Award Detail						Back to Award [Detail
Direct Award Test Awarded Awarded by: Rhode Island- DEMO Project Title: Direct Award Test Approved amount: \$100.00 Match type: Performance period: 08/01/2022 -07/31/2023							
Project Team							~
Add Team Member Show 10 -> entries					Search:		
Invitation Email	11	Accepted By	1t	Status 🕸	Actions		11
		No project team members to display.					
Showing 0 to 0 of 0 entries						Previous	Next



Input the email address of the team member you wish to add. You can also check if you want that team member to receive email notifications about the grant. Click *Add Member*.

	×
Add Project Team Member	
The following person will be invited to your project to help collaborate.	
Email address:	
Receive notifications for this award.	
Cancel	Add Member
Cancer	Aud Weinber

Once you have invited team members, you will see their status as *Pending*. Under *Actions* you can delete the invite, re-send the invite, or change their award notifications.

			Search:
↓≞ ≠	Accepted By	↓ Status	It Actio
		Pending	=
			Resend Invitation
			Delete Invitation
	ţĿ	↓1 Accepted By	

Once the team member has accepted the invite, their *Status* and *Actions* options will change:

Project Team								^
Add Team Member								
Show 10 ~ entries					Search:			
Invitation Email	↓±	Accepted By	(↓î	Status	.↓†	Actions	11
h@doa.ri.gov		h@doa.ri.gov(Stephen Smith)			Accepted		≡	
Showing 1 to 1 of 1 entries					Remove Tea	m Memb	er is	1 Next

Note: Only users with the role *Owner* can add new team members to a grant award dashboard. Users with the role *Team Member* cannot add other team members. Besides that, all team members have the same level of access as the *Owner* to view and submit reports to the Grantor. If you need the *Owner* role transferred to another user, reach out to your grantor agency. If you subaward these funds to other entities, do NOT add Team Members from those entities. All Team Members should be directly affiliated with your entity.



Accepting an Invite to Join a Grant Award

They will receive an email from <u>Support@eCivis.com</u> notifying them that someone has invited them to join their project team in eCivis Portal. The team member should click the link in the email to accept or decline the invite:

has invited you to join their grant project team on the eCivis Portal.
Project Name: Direct Award Test
Please use the following link to respond. You may be required to create a free account if you do not
already have an account on the eCivis Portal:
https://portal.ecivis.com/#/loginTeam/90C14071-1362-42FF-A2FA-E390AD3A252A [mandrillapp.com]
Sincerely,
The eCivis Support Team
support@ecivis.com
(877) 232-4847, option 2, 8am-5pm PT

Clicking on that link will bring them to the invitation in eCivis Portal. They may be prompted to create an account if they have not already. With the invite open, click *Accept Invitation*.

© eCivis		
 My Applications 		
🝸 My Awards	Project Team Invitation	
A My Profile	Invitation Detail	
	You have been invited to join the project team for Direct Award Test by it	
	Accept invitation Reject Invitation	

Once accepted, that team member will see the grant in their *My Awards* tab of their eCivis Portal with their role listed as "Team Member"

© eCivis								Stepher
# My Applications								
🝸 My Awards	My Awards							
🛔 My Profile	Show 10 v entries							Search:
	Grant Title	Project Title	Award/Contract Number	Award Type	Award Status	Notification Date	Performance Period	Role
	Direct Award Test	Direct Award Test	RI-2022-1234	N/A	Awarded	08/08/2022	8/1/22 - 7/31/23	Team Member



Accepting an Award Ownership Transfer Request

If needed, the grantor agency can transfer the *Award Owner* permissions to another user at the subrecipient's entity. An example would be if the original *Award Owner* no longer works for the subrecipient entity, and the award needs to be transferred to someone else. If the grantor agency invites you to become the *Award Owner*, you will receive an email notification. Click on the hyperlinked *Initiate Award Transfer* to view additional details about the award.



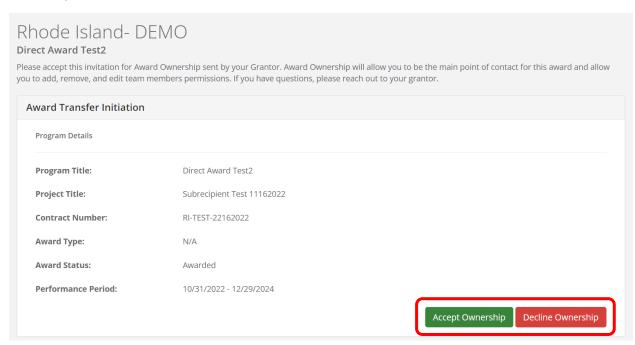
Please accept this invite to join the project Subrecipient Test 11162022 - RI-TEST-22162022 from Rhode Island- DEMO - Department of Administration. If you have an eCivis Portal account, you may click the link and log in. If not, you may click the link and create an account. If you have questions, please reach out to your Grantor.

Initiate Award Transfer [mandrillapp.com]

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

Sincerely, Test

This will prompt you to log in to eCivis Portal. Once logged in, an *Award Transfer Initiation* will appear with additional details on the award. Review the details and click *Accept Ownership* or *Decline Ownership*.



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Once you accept ownership, you can find the grant in your *My Awards* tab. Your role will be listed as *Owner*.

eCivis							1	Katje Benoi	it 🕞 Log out
🖤 My Awards	My Awards								^
👗 My Profile	Show 10 ~	entries					Search: dir	ect	
	Grant Title	Project Title lî	Award/Contract Number	Award Type I	Award Status 🕼	Notification Date Iî	Performance Period	Role ↓↑	Actions
	Direct Award Test2	Subrecipient Test 11162022	RI-TEST-22162022	N/A	Awarded	11/16/2022	11/1/22 - 12/30/24	Owner	=
	Direct Award	Goals Test	RI-TEST-2022-003	N/A	Awarded	08/31/2022	8/11/22 - 5/30/23	Owner	=



Submitting a Financial Report (Payment Request)

Financial Reports in eCivis Portal will be your way of requesting funds from your grantor agency. Financial Reports may also be submitted for reporting purposes only, not to request a payment. Financial Reports submitted through eCivis Portal will be reviewed and approved/returned for changes/rejected by your grantor. Approved Financial Reports with funds requested will then be sent to the state's financial system for payment to your entity. Financial Reports may be assigned to you to submit on a cadence. To check this and all upcoming due dates, view the *Pending Tasks* section of your Award Dashboard.

From your Award Dashboard, click on Submit Financial Report.

Award Dashboard						
Award Detail	View Budget View Files	Submit Financial Report	Submit Activity Report	Request Grant Amendment	Award Closeout	Manage Project Team
Subrecipient: Direct Award Test Organization	Program: Direct Award Test					

If your grantor has requested Financial Reports be submitted by certain date, a pop-up will appear asking you to select from the drop-down menu which report due date you want to create. Once selected, click *Create Report*.

Would you like to use an exi	isting financial report, or	create a n	ew report? X
Pending Financial Report Requ	uests:		
Due Date:		~	Create Report
	Cancel	Continue	e with New Report

You can also initiate a Financial Report by clicking *Create Financial Report* from the *Actions* column in your Pending Tasks table.

Award Detail	View Budget View Files Submit F	inancial Report Submit Activity Report Reques	t Grant Amendment Award Closeout	Manage Project Tear
Subrecipient: Direct Award Test Organization Project: Direct Award Test Award Status: Awarded Approval Date::08:08:022 Approved amount: \$10:00 Total Non-Geral Award: \$100:00 Total Match:\$0:00 Performance period::08:01/2022 - 07/31/2023	Program: Direct Award Test Award ID: Ri-2022-1234 EIN: 12-1234567			
Pending Tasks				
Show 10 v entries			Search:	
Show 10 v entries Task Type	II Date Created	🎼 Due Date	Search:	
	II Date Created OB/08/2022	Due Date 11/25/2022		
Task Type			11 Actions	
Task Type Activity Report Request	08/08/2022	11/25/2022	Actions	

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The top of each Financial Report, *Award Financial Overview*, is not editable but will update with each Financial Report you submit. This area is a summary of the total award spend and the total award amount remaining.

nancial Report				
ard Detail				Back to Award De
rect Award Test Awards arded by: Rhode Island- DEMO oject Tide: proved amount: \$100.00 atch type: rformance period: 08/01/2022 -07/31/3	2023			
ard Financial Overview				
overview will update in real time as you	i complete your financial request. The data here re Advance/Allocation	effects all submitted spending reports, even those still in the a Reimbursement	pproval process. Total Disbursed	Pending Disbursement
				Pending Disbursement
overview will update in real time as you	Advance/Allocation	Reimbursement	Total Disbursed	
overview will update in real time as you	Advance/Allocation	Reimbursement	Total Disbursed	
overview will update in real time as you	Advance/Allocation	Reimbursement \$ 0.00	Total Disbursed	
overview will update in real time as you Payments Received To Date	Advance/Allocation S 0.00 Spend	Reimbursement 5 0.00 Match	Total Disbursed S 0.00 Spend + Match S 0.00	-

In the *Financial Report Details* section, start by clicking inside the *Reporting Period* box and provide the dates of the reporting period then click apply:

port	0																
m 0	8/31/	/2022	2				m 0	8/31	/2022	2				Apply	Cancel		
<		A	ug 202	22					S	ep 202	22		>				Award Ap
Su	Мо	Tu	We	Th	Fr	Sa	Su	Мо	Tu	We	Th	Fr	Sa			\$	20.00
31	1	2	3	4	5	6	28	29	30	31	1	2	3				
7	8	9	10	11	12	13	4	5	6	7	8	9	10			\$	20.00
14	15	16	17	18	19	20	11	12	13	14	15	16	17				
21	22	23	24	25	26	27	18	19	20	21	22	23	24			\$	20.00
28	29	30	31	1	2	3	25	26	27	28	29	30	1			\$	20.00
4	5	6	7	8	9	10	2	3	4	5	6	7	8			-	20.00
			٦.	5011		\$	0.00)				\$	0.0	00		\$	0.00

Reporting periods should not include dates in the future.



Enter the amounts in the appropriate budget category under the *Spend* and *Match* (if necessary) columns. Spend is the amount of grant funds spent. Match is the amount of match funds spent. Subrecipients can only report in budget categories they have been awarded in. If a category is greyed out, and you would like to request reimbursement in that category, a grant amendment is needed. The first set of columns are for you to report/request funds. The second set of columns are to show you what was approved with your award. The third set of columns show you how much money you have remaining in each category. You cannot request more than what is remaining, you will see the box turn red and you will be unable to submit. Make sure you have no errors before moving to the next section.

Category	9	Spend			Match			Award Approved		Match Approved			Award Remaining			Match Remaining			Total Remaining
1. PERSONNEL	\$ 20.00	D		\$	0.00		\$	20.00	\$	0.00		s	0.00		\$	0.00		\$	0.00
2. FRINGE BENEFITS	\$ 30.00	0		\$	0.00		\$	20.00	\$	0.00		\$	-10.00		\$	0.00		\$	-10.00
3. TRAVEL	\$ 0.00			\$	0.00		\$	20.00	\$	0.00		\$	20.00		\$	0.00		\$	20.00
4. EQUIPMENT	\$ 15.00	0		\$	0.00		\$	20.00	\$	0.00		\$	5.00		\$	0.00		\$	5.00
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	\$ 5.00			s	0.00		\$	20.00	\$	0.00		s	15.00		\$	0.00		\$	15.00
11. INDIRECT COSTS	\$ 0.00			\$	0.00		\$	0.00	\$	0.00		\$	0.00		\$	0.00		\$	0.00
Report Total	5	Spend			Match			Total Award Approved		Total Match Approved			Total Award Remaining			Total Match Remaining			Total Remaining
	\$ 70.00	D		s	0.00		s	100.00	\$	0.00		s	30.00		\$	0.00		\$	30.00
	100.00		%	0.00		%			0.0	00	%	30.	00	%	0.0	D	%	30.	00

Note: Some programs do not have a budget built into the eCivis Portal system and only need you to request your total spend, not broken down by budget categories. An example of that is below where you will enter in your total request in the one *Reported Spending* field. The rest of the Financial Report will function the same.

Category		Spend			Match			Award Approved		Match Approved			Award Remaining			Match Remaining			Total Remaining	
1. Reported Spending	\$	0.00		\$	0.00		s	10,000.00	\$	0.00		\$	9,950.00		\$	0.00		\$	9,950.00	
Report Total		Spend			Match			Total Award Approved		Total Match Approved			Total Award Remaining			Total Match Remaining			Total Remaining	
	\$	0.00		s	0.00		s	10,000.00	\$	0.00		s	9,950.00		\$	0.00		\$	9,950.00	
	0.0	0	%	0.0)	%			0.0	0	%	99.	50	%	0.0	0	%	99.	50	%

Below the budget table, mark the checkbox "Reimbursement Request". Your total request will be automatically populated using what you entered in the budget categories above. **This box must be checked if you are requesting payment.**





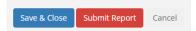
In the *Financial Report Narrative* enter details on your request and any other details requested by your grantor.

se ue	velop	your n	arrative	e belov	v inc	luding	key m	etrics,	spen	ding o	etails	and o	ther p	ertiner	nt details
Ø	H1	H2	H3	в	I	U	i≡	!≡		⊡	90				
Ente	r narra	ative he	ere												

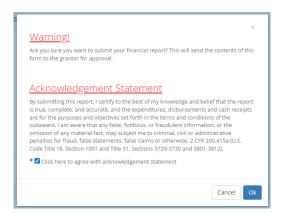
In the final section, upload all supporting documentation (i.e.: invoices, personnel time and effort, receipts, etc.) necessary to support your Financial Report/reimbursement request.

Financial Report Files	
Place upload any files necessary For your financial report. This may include financial transacti Upload File Show 10 v entries	ns, receipts, program income, etc
File Name	File Size
	No files are available for download
Showing 0 to 0 of 0 entries	

You can *Save & Close* to finish the report at a later date or *Submit Report*. Pressing *Cancel* will discard the report and no changes will be saved.



When you click *Submit Report* a warning message will appear to ensure you are ready to submit. You must check the Acknowledgement Statement box in order to the submit the Financial Report. Then click *Ok.*





Once you click *Ok*, you will be brought back to your Award Dashboard. You can scroll down to the *Award Activities* section to view your submitted Financial Report and its current status.

how 10 v entries Search:											
Report	11	Reporting Period	11	Created By	11	Date Created	Current Status	J†.	Actions		
Financial Report		08/01/2022 08/31/2022		Katje Benoit		08/31/2022	Pending Approval		View Report		

If Changes to Your Financial Report are Requested by Your Grantor...

If your Financial Report is returned to you by the grantor, you will be notified via email (from <u>Support@eCivis.com</u>) with a note telling you what needs to be changed/fixed:

0	
eCivis	
Your Financial Report for the	following program has a response:
Program:	Direct Award Test
Project:	Direct Award Test
Award/Contract Number	: RI-2022-1234
Financial Report:	08/01/2022 - 08/31/2022
Status:	Changes Requested
Review Comment: Please upload the correct su	oporting documentation and resubmit.
You may view your Financial	Report here [portal.ecivis.com]
Please contact support@eciv	is.com for technical issues or questions.
Sincerely,	
Test	

You will also see the status of the report change in the *Award Activities* section of your Award Dashboard. Click on the hyperlinked *Review/Resubmit* under Actions to make your changes.

ward Activities											
5how 10 🗸 6	entri	es						Search:			
Report	11	Reporting Period	.↓†	Created By	ļ1	Date Created	1	Current Status	1t	Actions	1
Financial Report		08/01/2022 08/31/2022		Katje Benoit		08/31/2022		Changes Requested		Review/Resubmit	



This will take you to your financial report how you previously submitted it. Review "Note from the grantor" for instructions on how to edit your Financial Report.

Financial Report Details Changes Requested
Note from the grantor:
Please upload the correct supporting documentation and resubmit.

Make the necessary changes to your Financial Report and re-submit.

Save & Close	Re-Submit Report	Cancel

Once your Financial Report has been approved, the *Current Status* will change to "Approved / Awaiting Payment."

Award Activities									
Show 10 ~	entr	ies				Search:	_		
Report		Reporting Period	Created By	11	Date Created	Current Status	11	Actions	
Financial Report		09/09/2022 09/19/2022	Katje Benoit		08/11/2022	Approved / Awaiting Payment	J	View Report	t

Once payment is processed, the *Current Status* will change to "Approved / Paid" and reflect in your Award Remaining amount. All completed Financial Reports can always be revisited in a view-only screen by clicking *View Report* under the Actions column.

A	ward Activities					^								
1	Show 10 ~ entri	N 10 V entries Search:												
	Report 👫	Reporting Period	Created By	Date Created 🛛 🕸	Current Status	↓† Actions ↓†								
	Financial Report	05/01/2022 05/27/2022	Katje Benoit	04/25/2022	Approved / Paid	View Report								



Submitting an Advance Payment Request

Requesting an Advance Payment from your grantor agency will also be done through the Financial Report functionality. Advance Payment requests allow you to request funds from your grantor agency in a lump sum, and report on how that amount was spent at a later date. Only request an Advance Payment if your subaward agreement explicitly allows advances of funds. Approved Advance Payment requests will then be sent to the state's financial system for payment to your entity.

From your Award Dashboard, click on Submit Financial Report.

Award Dashboard			
Award Detail	View Budget View Files Submit Financial Report	Submit Activity Report Request Grant Amendmen	Award Closeout Manage Project Team
Subrecipient: Direct Award Test Organization Project: Direct Award Test Award Status: Awarded Approval Date:08/08/2022 Approved mamunt: \$100.00 Total Non-Federal Award: \$100.00 Total Match:\$0.00 Performance period:08/01/2022 - 07/31/2023	Program: Direct Award Test Award ID: RI-2022-1234 EIN: 12-1234567		

To submit an Advance Payment request that may not be part of your grantor's reporting schedule, click *Continue with New Report* from the pop-up.

Would you like to use an exi	isting financial report, or create a new report? $\qquad imes$
Pending Financial Report Requ	Jests:
Due Date:	✓ Create Report
	Cancel Continue with New Report



The top of each Financial Report, *Award Financial Overview*, is not editable but will update with each Financial Report you submit. This area is a summary of the total award spend and the total award amount remaining.

nancial Report				
ard Detail				Back to Award De
rect Award Test Awards arded by: Rhode Island- DEMO oject Tide: proved amount: \$100.00 atch type: rformance period: 08/01/2022 -07/31/3	2023			
ard Financial Overview				
overview will update in real time as you	i complete your financial request. The data here re Advance/Allocation	effects all submitted spending reports, even those still in the a Reimbursement	pproval process. Total Disbursed	Pending Disbursement
				Pending Disbursement
overview will update in real time as you	Advance/Allocation	Reimbursement	Total Disbursed	
overview will update in real time as you	Advance/Allocation	Reimbursement	Total Disbursed	
overview will update in real time as you	Advance/Allocation	Reimbursement \$ 0.00	Total Disbursed	
overview will update in real time as you Payments Received To Date	Advance/Allocation S 0.00 Spend	Reimbursement 5 0.00 Match	Total Disbursed S 0.00 Spend + Match S 0.00	-

In the *Financial Report Details* section, start by clicking inside the *Reporting Period* box and provide the dates of the reporting period then click apply:

	ing P	enou																		
 ₿ 0	8/31/	/2022	2				m 0	8/31	/2022	2				Apply	Ca	ancel				
<		A	ug 202	22					s	ep 202	22		>				Award Ap			
Su	Мо	Tu	We	Th	Fr	Sa	Su	Мо	Tu	We	Th	Fr	Sa				\$ 20.00			
31	1	2	3	4	5	6	28	29	30	31	1	2	3							
7	8	9	10	11	12	13	4	5	6	7	8	9	10				\$ 20.00			
14	15	16	17	18	19	20	11	12	13	14	15	16	17							
21	22	23	24	25	26	27	18	19	20	21	22	23	24				\$ 20.00			
28	29	30	31	1	2	3	25	26	27	28	29	30	1				\$ 20.00			
4	5	6	7	8	9	10	2	3	4	5	6	7	8				 20.00			
			٦.	5011		\$	0.00)			_	\$	0.0	0			\$ 0.00			

For Advance Payments, select today's date for the Reporting Period start and end, unless advised differently by your grantor.



In the budget breakdown, leave all *Spend* column categories at \$0. For Advance Payments, you will request a lump sum and then report on how it was spent, by category, at a later date. Check the *Reimbursement Request* box and enter the amount of funding you are requesting as part of the Advance Payment.

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



Note: Some programs do not have a budget built into the eCivis Portal system and only need you to request your total spend, not broken down by budget categories. For Advance Payment requests, do not enter a dollar amount in the *Reported Spending* category. Check the *Reimbursement Request* box and enter the amount of funding you are requesting as part of the Advance Payment.

Category	Spend
1. Reported Spending	\$ 0.00
Report Total	Spend
	\$ 0.00
	0.00 %
Reimbursement Request*	

In the *Financial Report Narrative* enter details on your request and any other details requested by your grantor. Make sure to include a note that this is an Advance Payment request.

se de	velop	our na	rrative b	elow incl	uding key	metrics,	spendinį	g details,	and othe	r pertine	nt details.
Ø	H1	H2	НЗ	B I	<u>U</u> :≡	;≡		9			
Ente	r narra	tive her	e								

In the final section, upload any documentation required by your grantor to support your Advance Payment request.

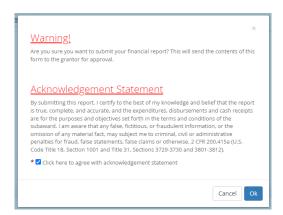
Financial Report Files	
Place upload any files necessary For your financial report. This may inc Upload File Show 10 v entries	:lude financial transactions, receipts, program income, etc
File Name	11 File Size
	No files are available for download
Showing 0 to 0 of 0 entries	



You can *Save & Close* to finish the report at a later date or *Submit Report*. Pressing *Cancel* will discard the report and no changes will be saved.

Save & Close	Submit Report	Cancel

When you click *Submit Report* a warning message will appear to ensure you are ready to submit. You must check the Acknowledgement Statement box in order to the submit the Financial Report. Then click *Ok.*



Once you click *Ok*, you will be brought back to your Award Dashboard. You can scroll down to the *Award Activities* section to view your submitted Financial Report/Advance Payment and its current status.

10 V	entrie	5					Search:			
Report	J1	Reporting Period	.↓†	Created By	11	Date Created	Current Status	1t	Actions	Ļ
- inancial Report		08/01/2022 08/31/2022		Katje Benoit		08/31/2022	Pending Approval		View Report	

Once your Financial Report/Advance Payment has been approved, the *Current Status* will change to "Approved / Awaiting Payment"

ward Activities										
Show 10 ~	entr	ies					Search:			
Report		Reporting Period	Created By	11	Date Created	J1	Current Status	1t	Actions	
Financial Report		09/09/2022 09/19/2022	Katje Benoit		08/11/2022		Approved / Awaiting Payment		View Report	t



Once payment is processed, the *Current Status* will change to "Approved / Paid" and reflect in your Award Remaining amount. All completed Financial Reports can always be revisited in a view-only screen by clicking *View Report* under the Actions column.

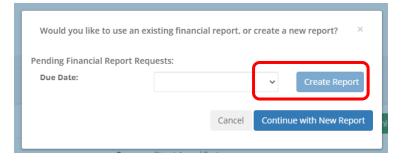
Award Activities								~
Show 10 v entr	ies					Se	arch:	
Report 👘	Reporting Period	11	Created By	11	Date Created 🛛 🕸	Current Status	tt.	Actions 👫
Financial Report	05/01/2022 05/27/2022		Katje Benoit		04/25/2022	Approved / Paid		View Report

Reporting How an Advance Payment was Spent

After you have received your Advance Payment, you will need to report on how it was spent. Repeat this process as many times as necessary to document how the funds were spent. To submit a report, from your Award Dashboard, click on *Submit Financial Report*.

Award Dashboard					
Award Detail	View Budget View Files Submit Financial Report	Submit Activity Report	Request Grant Amendment	Award Closeout	Manage Project Team
Subrecipient: Direct Award Test Organization Project: Direct Award Test Award Status: Awarded Approval Date:08/08/2022 Approved amount: \$100.00 Total Non-Federal Award: \$100.00	Program: Direct Award Test Award ID: RI-2022-1234 EIN: 12-1234567				
Total Match:\$0.00 Performance period:08/01/2022 - 07/31/2023					

Either choose an upcoming report due date or click *Continue with New Report* from the pop-up.





You can also initiate a Financial Report by clicking *Create Financial Report* from the *Actions* column in your Pending Tasks table.

Award Dashboard						
Award Detail	View Budget View Files	Submit Financial Report S	ubmit Activity Report	Request Grant Amendment	Award Closeout	Manage Project Team
Project: Direct Award Test Award Status: Awarded	Program: Direct Award Test Award ID: RI-2022-1234 EIN: 12-1234567					
Pending Tasks						^
Show 10 v entries					Search:	
Task Type	Date Created		La Due Date		Actions	
Activity Report Request	08/08/2022		11/25/2022		=	
Financial Report Request	08/08/2022		07/05/2023			
Activity Report Request	08/08/2022		09/25/2022	Create Financial Rep		
Financial Report Request	08/08/2022		04/05/2023	Mark Task Complete	-	

The top of each Financial Report, *Award Financial Overview*, is not editable but will update with each Financial Report you submit. This area is a summary of the total award spend and the total award amount remaining.

Financial Report				
Award Detail				Back to Award Detail
Direct Award Test Awards Awarde by: Rhode Island- DEMO Project Title: Approved amount \$100.00 Match type: Performance period: 08/01/2022-07/31/2 Award Financial Overview		all submitted spending reports, even those still in the app	mul norress	~
Payments Received To Date	Advance/Allocation	Reimbursement	Total Disbursed	Pending Disbursement
	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
	Spend	Match	Spend + Match	
Award Total Spend to Date	\$ 0.00	\$ 0.00	\$ 0.00	
	0.00 %	0.00 %		
Award Remaining to Date	\$ 100.00	\$ 0.00	\$ 100.00	



In the *Financial Report Details* section, start by clicking inside the *Reporting Period* box and provide the dates of the reporting period. Reporting periods should not include dates in the future. Then click apply:

eport	ing P	eriod	:*														
m 0	8/31/	/2022	2				🗰 C	8/31	/202	2				Apply	Ca	ancel	
<		A	ug 202	22					s	ep 202	22		>				Award A
Su	Мо	Tu	We	Th	Fr	Sa	Su	Мо	Tu	We	Th	Fr	Sa				\$ 20.00
31	1	2	3	4	5	6	28	29	30	31	1	2	3				
7	8	9	10	11	12	13	4	5	6	7	8	9	10				\$ 20.00
14	15	16	17	18	19	20	11	12	13	14	15	16	17				
21	22	23	24	25	26	27	18	19	20	21	22	23	24				\$ 20.00
28	29	30	31	1	2	3	25	26	27	28	29	30	1				\$ 20.00
4	5	6	7	8	9	10	2	3	4	5	6	7	8				20.00
			5.	5011		\$	0.00)				\$	0.0	00			\$ 0.00

Enter the amounts in the appropriate budget category under the *Spend* and *Match* (if necessary) columns. Spend is the amount of grant funds spent. Match is the amount of match funds spent. Subrecipients can only report in budget categories they have been awarded in. If a category is greyed out, and you would like to request reimbursement in that category, a grant amendment is needed. The first set of columns are for you to report on funds spent. The second set of columns are to show you what was approved with your award. The third set of columns show you how much money you have remaining in each category. You cannot report spend funds more than what is remaining, you will see the box turn red and you will be unable to submit. Make sure you have no errors before moving to the next section.

Category		Spend		Match		Award Approved		Match Approved		Award Remaining		Match Remaining		Total Remaining
1. PERSONNEL	\$	20.00		\$ 0.00	\$	20.00	\$	0.00	s	0.00	\$	0.00	\$	0.00
2. FRINGE BENEFITS	s	30.00		\$ 0.00	s	20.00	\$	0.00	\$	-10.00	\$	0.00	\$	-10.00
3. TRAVEL	\$	0.00		\$ 0.00	\$	20.00	\$	0.00	\$	20.00	\$	0.00	\$	20.00
4. EQUIPMENT	\$	15.00		\$ 0.00	\$	20.00	\$	0.00	\$	5.00	\$	0.00	\$	5.00
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	s	0.00		\$ 0.00	s	0.00	\$	0.00	s	0.00	\$	0.00	\$	0.00
9. CONSTRUCTION	\$	0.00		\$ 0.00	s	0.00	\$	0.00	s	0.00	\$	0.00	\$	0.00
10. OTHER	\$	5.00		\$ 0.00	s	20.00	\$	0.00	s	15.00	\$	0.00	\$	15.00
11. INDIRECT COSTS	\$	0.00		\$ 0.00	s	0.00	\$	0.00	s	0.00	\$	0.00	\$	0.00
Report Total		Spend		Match		Total Award Approved		Total Match Approved		Total Award Remaining		Total Match Remaining		Total Remaining
	s	70.00		\$ 0.00	s	100.00	\$	0.00	s	30.00	\$	0.00	\$	30.00
	100.0	00	%	0.00 %			0.0	90 %	30	.00 %	0.0	0 %	30	.00 %



Note: Some programs do not have a budget built into the eCivis Portal system and only need you to report your total spend, not broken down by budget categories. An example of that is below where you will enter in your total spend in the one *Reported Spending* field. The rest of the Financial Report will function the same.

Category	Spend	Match	Award Approved	Match Approved	Award Remaining	Match Remaining	Total Remaining
1. Reported Spending	\$ 0.00	\$ 0.00	\$ 10,000.00	\$ 0.00	\$ 9,950.00	\$ 0.00	\$ 9,950.00
Report Total	Spend	Match	Total Award Approved	Total Match Approved	Total Award Remaining	Total Match Remaining	Total Remaining
	\$ 0.00	\$ 0.00	\$ 10,000.00	\$ 0.00	\$ 9,950.00	\$ 0.00	\$ 9,950.00
	0.00 9	6 0.00 %		0.00 %	99.50 %	0.00 %	99.50 %

Below the budget table, leave the "Reimbursement Request" checkbox **unchecked**. This report is only to report on the Advance Payment that was already paid out to you, and not to request more funds.



In the *Financial Report Narrative* enter details on how the Advance Payment was spent and any other details requested by your grantor.

ease d	levelop y	our narra	tive below	including k	ey metric	i, spendin	g details, ai	nd other p	ertinent deta	ils.
\$	H1	H2 H	3 B	ΙU	i≡ ≡	·= 0	•			
Ent	er narra	tive here								

In the final section, upload all supporting documentation (i.e.: invoices, personnel time and effort, receipts, etc.) necessary to support how the Advance Payment was spent.

Financial Report Files		
Blease uplead any files necessary For your financial report. This may include financial transa Upload File Show 10 v entries	ctions,	receipts, program income, etc
File Name	$\downarrow \underline{\mathbb{F}}$	File Size
		No files are available for download
Showing 0 to 0 of 0 entries		



You can *Save & Close* to finish the report at a later date or *Submit Report*. Pressing *Cancel* will discard the report and no changes will be saved.

Save & Close Submit Report Cance	Save & Close	Submit Report	Cancel
----------------------------------	--------------	---------------	--------

When you click *Submit Report* a warning message will appear to ensure you are ready to submit. The system will notify you that you have not selected reimbursement, which is correct since you are only reporting on how an Advance Payment was spent, and not requesting additional funds at this time. You must check the Acknowledgement Statement box in order to the submit the Financial Report. Then click *Ok.*

×
<u>Warning!</u>
Are you sure you want to submit your financial report? This will send the contents of this form to the grantor for approval.
You have not selected reimbursement. Are you sure you do not wish to make this a reimbursement request?.
<u>Acknowledgement Statement</u>
By submitting this report, I certify to the best of my knowledge and belief that the report is true, complete, and accurate, and the expenditures, disbursements and cash receipts are for the purposes and objectives set forth in the terms and conditions of the subaward. I am aware that any false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil or administrative penalties for fraud, false statements, false claims or otherwise. 2 CFR 200.415a (U.S. Code Title 18, Section 1001 and Title 31, Sections 3729-3730 and 3801-3812).
If applicable, I further certify that the personnel expense amounts set forth above for payment with grant funds are supported by auditable documentation meeting the standards of 2 CFR 200.430.
★ 🗹 Click here to agree with acknowledgement statement
Cancel

Once you click *Ok*, you will be brought back to your Award Dashboard. You can scroll down to the *Award Activities* section to view your submitted Financial Report and its current status.

now 10 v e	entrie	5						Search:			
Report	11	Reporting Period	ļţ	Created By	11	Date Created	Jt	Current Status	11	Actions	Ļ
Financial Report		08/01/2022 08/31/2022		Katje Benoit		08/31/2022		Pending Approval		View Report	



Reference the *If Changes to Your Financial Report are Requested by Your Grantor* section of this document for detailed instructions on how to edit and re-submit reports that were sent back for changes.

Once your Financial Report has been approved, the *Current Status* will change to "Approved." All completed Financial Reports can always be revisited in a view-only screen by clicking *View Report* under the Actions column.

Award Activities						^
Show 10 v en	ries			Searc	ch:	
Report 11	Reporting Period	Created By	Date Submitted	Current Status	ļt.	Actions 🕼
Financial Report	05/12/2023 06/05/2023	Katje Benoit	05/31/2023	Approved		View Report



Submitting an Activity Report

Activity Reports are used to track your progress on the project through documentation, narrative, and target goals.

Like Financial Reports, Activity Reports can be assigned to you to submit to your grantor on a cadence. To check this, look at the *Pending Tasks* section of your Award Dashboard.

From your Award Dashboard, click on Submit Activity Report.

Award Dashboard	
Award Detail	View Budget View Files Submit Financial Report Submit Activity Report Request Grant Amendment Award Goseout Manage Project Team
Subrecipient: Direct Award Test Organization Project: Direct Award Test Award Status: Awarded Approval Date:BX08/2022 Approved amount: \$100.00 Total Non-Federal Award: \$100.00	Program: Direct Award Test Award ID: RI-2022-1234 EIN: 12-1234567
Total Match:\$0.00 Performance period:08/01/2022 - 07/31/2023	

If your grantor has requested Activity Reports be submitted to them by certain date, a pop-up will appear asking you to select from the drop-down menu which report due date you want to create. Once selected, click *Create Report*.

Would you like to use an ex	isting activity report, o	r create a n	ew report? ×
Pending Activity Report Requ	ests:		
Due Date:		~	Create Report
	Cancel	Continu	ue with New Report

You can also initiate an Activity Report by clicking *Create Activity Report* from the *Actions* column in your Pending Tasks table.

ending Tasks					
Show 10 v entries				Search:	
Task Type	Date Created	ĻL	Due Date	11	Actions
Activity Report Request	08/08/2022		12/25/2022		=
Activity Report Request	08/08/2022		02/25/2023	Create Activity Rep	
Activity Report Request	08/08/2022		11/25/2022	Mark Task Comple	=



The first section of an Activity Report contains the Reporting Period and Report Narrative. Enter the dates for which this report is capturing and provide a detailed narrative to your grantor. Reporting periods should not include dates in the future. Reference program guidance on what to include in an Activity Report.

Activity Repo	
Reporting Perio	:*
	_
lease develop	ur narrative below including key metrics, and other pertinent details.
Report Narrati	

The next section is applicable to programs that have goals built into the system. If so, you will see an *Activity Report Metrics* section. Enter in your completed units in the white boxes (greyed out boxes show the summation of subgoal units). You can click which subgoal to report on from the drop-down menu and use the + / - icons to add or remove certain subgoals to this Activity Report. If requested by your grantor, also enter in the financial spend associated with completing your goals.

ctivity Report Metrics							
ase enter metrics to describe progress on your g	oals.						
Goal / Objective	Completed Units	ļ	ward Spend	P	/latch Spend	Pr	ogram Income Spend
Number of eligible small businesses that are served	0.00	\$	0.00	\$	0.00	\$	0.00
Subgoals							
Small Business Hair Salons	0.00	\$	0.00	\$	0.00	\$	0.00
Small Business Restaraunts	0.00	\$	0.00	\$	0.00	\$	0.00

The final section of the report is the *Activity Report Files*. Here you can upload any supporting documentation, including any specific forms requested by your grantor.

Activity Report Files					
Please upload any files necessary for y Upload File Show 10 v entries	/our activity report.			Search:	
File Name	↓±	File Size	ļt.	Actions	μt.
		No files are avai	able for download		
Showing 0 to 0 of 0 entries					Previous Next



To submit, click *Submit Report*. You can also hit *Save & Close* to save a draft and come back to submit at a later date. Hitting *Cancel* will discard the report and no changes will be saved.



Once submitted you will see it in the status of *Pending Approval* in your Award Activities table.

Award Activities								^
Show 10 v entr	ies				Search:			
Report 🕸	Reporting Period	11	Created By	Date Created	Current Status	-1t	Actions	11
Activity Report	09/01/2022 10/01/2022		Katje Benoit	09/01/2022	Pending Approval	J	View Report	

If Changes to Your Activity Report are Requested by Your Grantor

If your Activity Report is returned to you by the grantor, you will be notified via email (from <u>Support@eCivis.com</u>) with a note telling you what needs to be changed/fixed:

0	
eCivis	
Your Activity Report for the	e following program has a response:
Program:	Direct Award Test2
Project:	Goals Test
Award/Contract Numb	er:
Activity Report:	09/01/2022 - 10/01/2022
Status:	Changes Requested
Review Comment: Please attach supporting o	locumentation and resubmit.
You may view your Activity	/ Report here [mandrillapp.com].
Please contact support@e	civis.com for technical issues or question
Sincerely,	
Test	

You will also see the status of the report change in the *Award Activities* section of your Award Dashboard. Click on the hyperlinked *Review/Resubmit* under Actions to make your changes.

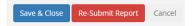
Award Activities								^
Show 10 v en	tries				Search:			
Report 1	Reporting Period	J†	Created By	Date Created	Current Status	J†	Actions	1t
Activity Report	09/01/2022 10/01/2022		Katje Benoit	09/01/2022	Changes Requested		Review/Resubmit	
Showing 1 to 1 of 1 er	ntries						Previous 1	Next



This will take you to your Activity Report how you previously submitted it. Review "Note from the grantor" for instructions on how to edit your Activity Report.

Activity ReportChanges Requested	
Note from the grantor: Please attach supporting documentation and resubm	it.

Make the necessary changes to your Activity Report and re-submit.



Once your Activity Report has been approved, the *Current Status* will update to *Approved*. You will also receive an email from <u>Support@eCivis.com</u> notifying you that your submitted Activity Report has been approved.

Award Activities										^
Show 10 v entr	ies						Search:			
Report 1	Reporting Period	11	Created By	111	Date Created	11	Current Status	J.	Actions	1t
Activity Report	09/01/2022 10/01/2022		Katje Benoit		09/01/2022		Approved		View Report	

All completed Activity Reports can always be revisited in a view-only screen by clicking *View Report* under the Actions column.



Submitting a Miscellaneous Report

Anything in your *Pending Tasks* table that is not labeled "Activity Report Approval", "Financial Report Approval", or "Closeout Approval" is a miscellaneous report. This can include documentation requests from your grantor where they need you to submit something to them that isn't included in an Activity or Financial Report.

From your *Pending Tasks* table, locate the report that is due. Click on the *Actions* icon and select *Create Task Response*

Pending Tasks			
Show 10 v entries		Search:	
Task Type	Date Created	Due Date	Actions
Submit FY22 Audit Documents for Review	09/01/2022	09/01/2022	=
Closeout Approval	08/31/2022	08/3(Create Task Res	ponse

The first section of the report will have a note from your grantor with instructions on what to complete/submit. In the Subrecipient Response area, include a narrative or response to the grantor.

ase submit y	our audit doc	uments for r	eview.		
brecipient R	esponse: *				
∢> H1	H2 H3	B I	U ≔	.⊒ %	

Next, review the *Task Files* section for documents that have been uploaded by your grantor. You can download and view/complete them by clicking the download icon in the *Actions* column. You can also upload your own files by clicking the green *Upload File* icon.

Task Files			
Please upload any files necessary for your task. * Upload File			
Show 10 ~ entries	Search:		
File Name	Įħ	File Size 斗	Actions
Test File.docx		11.7 KB	۵
Showing 1 to 1 of 1 entries		Previo	us 1

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When you have completed all sections and are ready to submit, click *Submit Task*. Clicking *Cancel* will discard your response and no changes will be saved.



Once submitted you will see it in the status of *Pending Approval* in your Award Activities table.

Award Activities									^
Show 10 ~ entries						Search:			
Report	Reporting Period	.↓↑	Created By	Date Created	$\downarrow \uparrow$	Current Status	ltı,	Actions	11
Submit FY22 Audit Documents for Review			Katje Benoit	09/01/2022		Pending Approval	J	View Task	

If Changes to Your Miscellaneous Task Response are Requested by Your Grantor

If your Task Report is returned to you by the grantor, you will be notified via email (from <u>Support@eCivis.com</u>) with a note telling you what needs to be changed/fixed:

eCivis
An approval task has been created that requires your attention in eCivis Grants Network.
Title: Direct Award Test2
Note:
Please submit your audit documents for review.
Status: Changes Requested Review Comment: Please attach completed template and resubmit
You may view your Misc Task here [portal.ecivis.com]
Please contact support@ecivis.com for technical issues or questions.
Sincerely,
Test

You will also see the status of the report change in the *Award Activities* section of your Award Dashboard. Click on the hyperlinked *Review/Resubmit* under Actions to make your changes.

Award Activities					~
Show 10 v entries				Search:	
Report It	Reporting Period	Created By 🗍	Date Created 🗍	Current Status 🛛 🗍	Actions 🕼
Submit FY22 Audit Documents for Review		Katje Benoit	09/01/2022	Changes Requested	Review/Resubmit



This will take you to your Task Report how you previously submitted it. Review "Note from the grantor" for instructions on how to edit your Task Report.



Cancel

Make the necessary changes to your Task Report and re-submit.

Once your Task Report has been approved, the *Current Status* will update to *Approved*. You will also receive an email from <u>Support@eCivis.com</u> notifying you that your submitted Task Report has been approved.

Award Activities							^
Show 10 ~ entries				Search:			
Report 🎼	Reporting Period	Created By	Date Created $\downarrow\uparrow$	Current Status	11	Actions	11
Submit FY22 Audit Documents for Review		Katje Benoit	09/01/2022	Approved		View Task	

All completed Reports can always be revisited in a view-only screen by clicking *View Task* under the Actions column.



Submitting a Grant Amendment

Subrecipients have the capability to submit a grant amendment through their eCivis Portal. This grant amendment can include budget or programmatic changes.

IMPORTANT NOTES:

- Subrecipients are not able to submit Financial Reports (Payment Requests) when an amendment with a financial change is in the status "Pending Approval." This is to ensure that funding is not overdrawn from budget categories while funding adjustments are pending. Once an amendment has been approved/rejected, you will be able to submit Financial Reports.
- Subrecipients can only submit one grant amendment at a time. While an amendment is in *Draft* or *Pending Approval* status, the green *Submit Grant Amendment* button will not appear on your Award Dashboard. The button will re-appear once there are no longer any amendments in *Draft* or *Pending Approval* status.

From the top of your Award Dashboard, click on Request Grant Amendment

Award Da	ashboard	k				
Award Detail	View Budget	View Goals	View Files	Submit Financial Report	Submit Activity Report	Request Grant Amendment
					Award Close	eout Manage Project Team

There can be up to 4 sections of the grant amendment

- Award details
- Financial Information
- Finalize Goals
- Attach Files

Grant Amendment			
AWARD DETAILS	FINANCIAL INFORMATION	FINALIZE GOALS	ATTACH FILES
Please edit the appropriate information below.			
Organization Name:*	Organization		
Project Name:*	Goals Test		
EIN:		(12-1234567)	
Performance Period End:*	05/31/2023		
			Cancel Save and Continue



In the *Award Details* section, you can propose amendments to the following data fields: Organization Name, Project Name, EIN, and Performance Period End date. The *Award Details* will auto-populate from the original details entered in your application/award process. To update the fields on this page, click inside the field and edit the data. If there are no changes, click *Save and Continue*.

Grant Amendment			
AWARD DETAILS	FINANCIAL INFORMATION	FINALIZE GOALS	ATTACH FILES
Please edit the appropriate information below.			
Organization Name:*	Organization		
Project Name:*	Goals Test		
EIN:		(12-1234567)	
Performance Period End:*	05/31/2023		
			Cancel Save and Continue

If the grant amendment includes a budget adjustment, check the box titled "This amendment includes a financial change". If the grant amendment does not include a budget adjustment, do not check the box and click *Continue*.

Grant Amendment			
AWARD DETAIL	S FINANCIAL INFORMATION	FINALIZE GOALS	ATTACH FILES
C	This amendment includes a financial change		Back Cancel Continue

If you have a submitted Financial Report that is pending approval, the following message will appear, and you will be unable to request financial changes until the Financial Report is no longer pending. To proceed, you can either hit "Cancel" to discard the amendment and restart when no Financial Reports are pending; or save the amendment and return to finalize it after all pending Financial Reports have been resolved.

	•		
AWARD DETAILS	FINANCIAL INFORMATION	FINALIZE GOALS	ATTACH FILES
This	amendment includes a financial change		
	0		



If the checkbox is checked, your awarded budget will appear. You can now open budget line items and request the budget adjustment.

	Budget Stag	ge: Post-Award					
	Actio	ins 🖪 🖉 🕼					
			Budg	get Summary			
	\$500.00	Total Direct Costs			\$0.00	Match / Cost Share	
	\$0.00	Total Indirect Costs			\$0.00	Program Income	
	\$500.00	Total Amount (Direct + Indirec	t)				
Budget Settings							~
Budget Items							~
		Ext Cost	Direct Cost	Ind Cost	<u>Cost Share</u>		
1. Personnel		\$500.00	\$500.00	\$0.00	\$0.00		
		Ext Cost	Direct Cost	Ind Cost	Cost Share		
2. Fringe Benefits		\$0.00	\$0.00	\$0.00	\$0.00		

To move money between budget categories, click on the hyperlinked budget category names and add/delete rows from the respective categories. For example, in the above budget, \$250 will be moved from the Personnel category and moved to the Fringe Benefits category. First, to remove funds, open the category by clicking on the hyperlinked *Personnel*. Update the amount by clicking in the table and editing the amount where needed:

Personnel									
			Ext Cost	Direct Co	st		Ind Cost	<u>Cost Share</u>	
Personnel Totals:		ls:	\$500.00 \$500.00			\$0.00	\$0.00		
Title	Description	Units	Unit Cost	Extended Cost	Cost GL Code		Item Type		
Personnel	Personnel	1.00	\$500.00	\$500.00	\$500.00		Direct Cost		



Once the *Personnel* category has been updated, open up the *Fringe Benefits* category. Click on the gear icon and select *Add Table*

			Ext Cost	Direct Cost	Ind Cost	Cost Share
	Perso	nnel Totals:	\$250.00	\$250.00	\$0.00	\$0.00
Title	Description	Units	it Cost Extended Cost	Cost GL Code	Item Type	
Personnel	Personnel	1.00	\$250.00 \$250.00	0 \$250.00 D	irect Cost	
Add Row						
00						
D						
	5					
ringe Benefits						
ringe Benefits						
ringe Benefits			Ext Cost	Direct Cost	Ind Cost	Cost Share
ringe Benenits			_			
ringe Benefits	Fringe Ben	efits Totals:	<u>Ext Cost</u> \$0.00	Direct Cost \$0.00	Ind Cost \$0.00	Cost Share
	Fringe Ben	efits Totals:	_			

In the table, enter a Title, Description, Unit and Unit cost. Make sure the Extended Cost and Cost fields populate as well.

Fringe Benefits							
				Ext Cost	Direct Co	ost	
	Fringe Ben	Fringe Benefits Totals:			\$250.00	þ	
Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Item Type
Fringe Benefits	Fringe Benefits	1.00	\$250.00	\$250.00	\$250.00		Direct Cost

Repeat this process as needed. When complete, scroll down and click Save Changes



The section below that is the *Budget Narrative*. Enter in the details and justification of your requested budget amendment here for your grantor to review. You can format the narrative or copy and paste from Word. When complete, click *Save Narrative*

Ø	H1	H2	H3	В	I	U	≔	ļ		Ξ	%
h d an a		0.6	0			Colores	Dene	Che en			
Mov	ed \$25	0 from	Persor	nnel to	o the	Fringe	Bene	tits ca	tegory		

Page **37** of **53** Last Updated 8/8/2023



When everything has been saved, click *Continue*. You will not be able to click *Continue* if you have unsaved changes in your budget or narrative section.



If you entered target units for goals in your application/award process, then you will have an option to update your goals target units through the budget amendment. To update your Target Units or Target Expenditures, click in the field and make necessary changes. When complete, click *Save and Continue*.

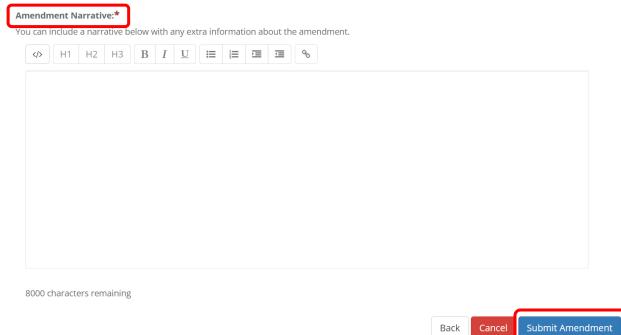
AWARD DETAILS	FINA	NCIAL INFORMATION	1	FINA	LIZE G	OALS	ATTACH F	ILES
suggest any updates to your goals.								
Goal / Objective		Target Units		Direct Cost Expenditure	E	Matching Expenditure	gram Income xpenditure	
lumber of eligible small businesse re served	s that	30.00	\$	0.00	\$	0.00	\$ 0.00	
SubGoals		\frown						
Small Business Hair Salons	~	10.00	\$	0.00	\$	0.00	\$ 0.00	/ -
Small Business Restaraunts	~	10.00	\$	0.00	\$	0.00	\$ 0.00	/ -
Small Business Theaters	~	10.00	\$	0.00	\$	0.00	\$ 0.00	/ -

The next section of the grant amendment functionality is to upload any files you need to support your amendment request for your grantor to review. Use the green *Upload File* button to attach documents.

ant Amendment							
AWARD DETAILS	FINANCIA	LINFORMATION	FINAL	IZE GOALS		ATTACH FILE	s
Please upload any files necessary recommended that you include a Upload File				ll be added to your ori	iginal award p	ackage. It is ł	nighly
Amendment Files							
Show 10 v entries				Search	ר:		
File Name	1ª	File Size	ţţ.	Actions			J1
		No files have be	een uploaded				
Showing 0 to 0 of 0 entries						Previous	Next



Lastly, you will need to enter an amendment narrative. Here is a good place to write what you are requesting, why, and any additional details you think are important. When complete, click *Submit Amendment*



Once submitted, you can track your amendments status by scrolling to the bottom of your Award Dashboard to the *Award Amendments* section.

Award Amendments					
Show 10 v entries				Search:	
Created Date	Į.	Status	ţţ	Actions	ţţ.
09/01/2022		Pending Approval		View Amendment	
Showing 1 to 1 of 1 entries					Previous 1 Next



If Changes to Your Amendment are Requested by Your Grantor

If your Grant Amendment is returned to you by the grantor, you will be notified via email (from <u>Support@eCivis.com</u>):

\odot	
eCivis	
Your amendment for the f	ollowing program has a response
Program:	Direct Award Test2
Project:	Goals Test
Award/Contract Numb	per:
Status:	Changes Requested
Full details are available i	n the <u>eCivis Portal [mandrillapp.com]</u> .
Please contact support@	ecivis.com for technical issues or questions.
Sincerely,	
Test	

You will also see the status of the report change in the *Award Amendments* section of your Award Dashboard. Click on the hyperlinked *Edit Amendment* under Actions to make your changes.

Award Amendments				
Show 10 ~ entries				Search:
Created Date	↓≞.	Status	tt.	Actions
09/01/2022		Changes Requested		Edit Amendment

At the top of the page, you will see a note from the grantor with instructions on what needs to be edited before resubmitting.

	Grant Amendment
1	NOTE: This amendment has been returned with changes requested. The changes requested were:
	Please include more detail in your amendment narrative and resubmit.



When you have gone through the amendment sections and made the necessary changes, hit *Submit Amendment* to resubmit.

Back Cancel Submit Amendment

If your Grant Amendment is approved, the *Current Status* will update to *Approved*. You will also receive an email from <u>Support@eCivis.com</u> notifying you that your submitted Grant Amendment has been approved. Similarly, if your Grant Amendment is rejected, the *Current Status* will update to *Rejected*, and you will receive an email from <u>Support@eCivis.com</u>.

Award Amendments			
Show 10 ~ entries			Sear
Created Date	Status	ţţ	Actions
09/01/2022	Approved		View Amendment

All completed amendments can always be revisited in a view-only screen by clicking *View Amendment* under the Actions column.



Reviewing and Accepting a Grantor Initiated Amendment

Your grantor agency can also create an amendment to make budget or programmatic changes to your award. Reviewing and accepting a grantor-initiated amendment looks and functions very similar to the award acceptance process and subrecipient-initiated amendments. You will be notified via email when a grantor-initiated amendment is created and requires your response.

You have the ability to make changes to the grantor-initiated amendment before it is finalized. We recommend you discuss any changes you'd like to make with your grantor, before making them. If you do make changes, the grantor will be able to review and accept or reject your changes.

In your eCivis Portal Award Dashboard, scroll down to the *Award Amendments* table. Locate the amendment in the *Pending Subrecipient Acceptance* status and under *Actions* click *Review*.

Award Amendments							
Show 10 v entries				Searcl	n:		
Created Date	Status	11	Amendment Type	11	Actions		ļţ.
11/16/2022	Approved		Subrecipient Amendment		View Ame	ndment	
04/27/2023	Pending Subrecipient Acceptance		Grantor Amendment		Review		
Showing 1 to 2 of 2 entries					F	Previous 1	l Next

On the first page is identifying information about your award. Review the information and click *Continue.*

rant Amendment			
AWARD DETAILS	FINANCIAL INFORMATION	FINALIZE GOALS	ATTACH FILES
Please edit the appropriate information	on below.		
Organization Name	TripleSmith Inc		
Project Name	Subrecipient Test 11162022		
EI	N: 12-3456789	(12-1234567)	
Performance Period End	12/30/2024		
			Save Cancel Continue



If a financial change was proposed (increase/decrease in award amount, money moved between budget categories), then the Financial tab will be next.

Similar to the award acceptance process, your updated awarded budget will appear. You can view the Total Amount in the Budget Summary section at the top and/or open each budget category to view more details on the funding updates.

Grant	Amendment						
	AWARD DETAILS		FINANCIAL INFO	PRMATION	FINALI	ZE GOALS	
		This amendment includ	es a financial change				
		Budget Stage: Pos	t-Award				
		Actions					
				Budge	et Summary		
		\$1,800.00 Total D	Pirect Costs			\$0.00	Match / Cost Share
		\$0.00 Total I	ndirect Costs			\$0.00	Program Income
		\$1,800.00 Total A	mount (Direct + Indirect)				
	Budget Settings						
	Budget Items						
			Ext Cost	Direct Cost	Ind Cost	<u>Cost Share</u>	
	1. PERSONNEL		\$600.00	\$600.00	\$0.00	\$0.00	
			Ext Cost	Direct Cost	Ind Cost	Cost Share	
	2. FRINGE BENEFITS		\$300.00	\$300.00	\$0.00	\$0.00	

Once you have reviewed the updated budget, scroll to the bottom and click *Continue*.





If your program does not have a budget built into the system, only the updated Award Amount, not broken down by budget categories, will show. Click Continue to accept the change.

Grant Amendment				
AWARD DETAILS	FINA		FINALIZE GOALS	ATTACH FILES
This amendment include Award Amount:*		s a financial change \$ 12,000.00		
	Match Type:*	N/A		
				Back Save Cance Continue

If your program is tracking goals and subgoals, then there will be a *Finalize Goals* tab with the updated *Target Units*. Once reviewed, click *Continue*.

m Income nditure
.00
.00 / -
.00 / -
.00 / -
).



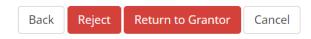
The final section will be the *Attach Files* page. From this page you can download and view any documentation your grantor agency attached to the amendment. If they require any documentation to be returned to them, here is where you would upload it using the *Upload File* button. Below that will be the Amendment Narrative that was input by your grantor agency. More information on what the amendment is proposing will be described here.

		Search:		
11	File Size	1 Actio	ons	ļţ.
	15.0 KB		۵ 🛍	
			Previous 1	Next
	17	••••		15.0 KB

Once all sections of the grantor-initiated amendment have been reviewed, you can accept or reject the amendment. Clicking *Accept* will send your acceptance to the grantor agency to review any uploaded documentation and finalize the amendment. Clicking *Reject* will reject the grantor-initiated amendment and no changes will be made to your award.



If you made any changes to the *Financial Information* page or the *Finalize Goals* page, the *Accept* button will be replaced by the *Return to Grantor* button. Click *Return to Grantor* to send your changes to the amendment to your grantor agency for them to review. Once the grantor reviews the changes made, the amendment will be sent back to you to review and accept. This process will continue until no more changes to the *Financial Information* or the *Finalize Goals* pages are made. The button will then change back to *Accept*.





Once the grantor-initiated amendment has been accepted, it will move to the status *Pending Final Approval*. At this time, the grantor agency is reviewing the amendment one last time before approving and finalizing it.

ward Amendments									
Show 10 v entries						Search:			
Created Date	$\downarrow \underline{\mathbb{F}}$	Status	.↓↑	Amendment Type	lî.	Actions			1
11/16/2022		Approved		Subrecipient Amendment		View Amendmen	t		
04/27/2023		Pending Final Approval		Grantor Amendment		View Amendment			
Showing 1 to 2 of 2 entries							Previous	1	Next

Note: if you made changes to the *Financial Information* page or the *Finalize Goals* page and returned those changes to the grantor agency, the status will update to *Subrecipient Changes Requested*.

ŀ	Award Amendments									
Show 10 v entries Search:										
	Created Date	J1	Status	$\downarrow_{\overline{2}}$	Amendment Type	Action	s			
	05/31/2023		Subrecipient Changes Requested		Grantor Amendment	View A	mendment			

Once the grantor agency finalizes the amendment, it will update to the status *Approved*. You will also be notified via email when the amendment is finalized/Approved. Any changes to your award proposed in the amendment will automatically take place.

Award Amendments Request Gra							
now 10 v entries					Search:		
Created Date	11	Status	J1	Amendment Type	Actions	ţ	
11/16/2022		Approved		Subrecipient Amendment	View Amendmen	t	
04/27/2023		Approved		Grantor Amendment	View Amendmen	t	

IMPORTANT NOTES:

- Subrecipients are not able to submit Financial Reports (Payment Requests) when an amendment with a financial change is in the status "Pending Approval." This is to ensure that funding is not overdrawn from budget categories while funding adjustments are pending. Once an amendment has been approved/rejected, you will be able to submit Financial Reports.
- Only one amendment can be proposed at a time. While an amendment is in *Draft* or *Pending Approval* status, the green *Submit Grant Amendment* button will not appear on your Award Dashboard. The button will re-appear once there are no longer any amendments in *Draft* or *Pending Approval* status.



Reviewing and Responding to Subrecipient Monitoring Tasks

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 grantor agencies 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 view and respond to monitoring tasks and Corrective Action Plans in eCivis, reference the <u>Subrecipient Monitoring Guide</u>.



Initiating Grant Closeout

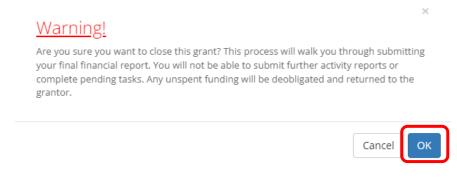
When you have completed all of your award activities, submitted all reports, completed all pending tasks, and are ready to close out your grant, click the yellow *Award Closeout* button from your Award Dashboard.

Note: Once you initiate Grant Closeout, you will no longer be able to edit or submit pending reports.

The following warning message will pop-up:

Are you sure you want to close this grant? This process will walk you through submitting your final financial report. You will not be able to submit further activity reports or complete pending tasks. Any unspent funding will be deobligated and returned to the grantor.

If you are ready to continue, click OK



This will open your final Financial Report (Reimbursement Request). For details on how to complete Financial Reports, navigate to the <u>Submitting a Financial Report (Reimbursement Request)</u> section of this user guide.

There will be an additional warning at the top of this report, reading:

ATTENTION: This is your final financial report. Please be sure you have completed all necessary performance reporting and assigned tasks prior to submitting this report. Any unspent funding will be unavailable for reimbursement after this report has been submitted.





Once you complete the report, click Submit Report.

Save & Close	Submit Report	Cancel
--------------	---------------	--------

A final warning statement will appear. If you have left unspent funds, it will notify you in red. Any funds requested in the final Financial Report are NOT included in the unspent funds amount, and will be paid out, if approved by the grantor. Read the full warning and acknowledgement statement before clicking the checkbox and hitting *Ok*.

Warning!

Are you sure you want to submit your financial report? This will send the contents of this form to the grantor for approval.

You have marked this as your final report. This will begin the closeout process.

There is an award remaining of \$78.00. Since this is your closeout report you will be unable to utilize the remaining funding. Are you sure you are ready to submit this report?

Closeout Acknowledgement Statement

By submitting this report, I certify to the best of my knowledge and belief that the report is true, complete, and accurate, and the expenditures, disbursements and cash receipts are for the purposes and objectives set forth in the terms and conditions of the subaward. I am aware that any false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil or administrative penalties for fraud, false statements, false claims or otherwise. 2 CFR 200.415a (U.S. Code Title 18, Section 1001 and Title 31, Sections 3729-3730 and 3801-3812).

* 🗆 Click here to agree with acknowledgement statement



×



Once you submit, your grant award status will change to *Closeout*.

My Applications									
🖤 My Awards	My Awards								^
▲ My Profile Show 10 ✓ entries Search:									
		Project Title ↓↑	Award/Contract Number	Award Type 🏼 🕸	Award Status 🕼	Notification Date 11	Performance Period	Role ↓↑	Actions
		Direct Award Test	RI-2022-1234	N/A	Closeout	08/08/2022	8/1/22 - 7/31/23	Owner	≡

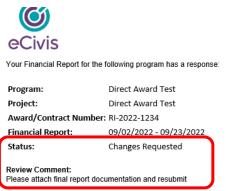
You will see your Award Dashboard no longer has the action item buttons (Submit Activity Report, Submit Financial Report, Request Grant Amendment, Manage Team Members). You will still be able to view your budget, goals, and award files in view-only screens.

Award Detail		View Budget View Files
Subrecipient: Direct Award Test Organization	Program: Direct Award Test	
Project: Direct Award Test Award Status: Closeout	Award ID: RI-2022-1234	
Approval Date:08/08/2022	EIN: 12-1234567	
Approved amount: \$100.00 +		
Total Non-Federal Award: \$100.00		
Total Match:\$0.00		
Performance period:08/01/2022 - 07/31/2023		



If Changes to Your Closeout Report are Requested by Your Grantor

If your Closeout Report is returned to you by the grantor, you will be notified via email (from <u>Support@eCivis.com</u>) with a note telling you what needs to be changed/fixed:

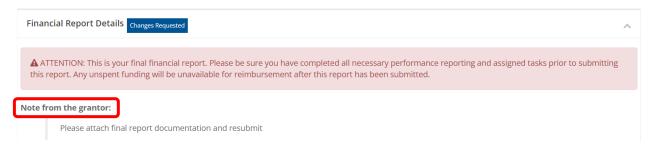


You may view your Financial Report here [portal.ecivis.com]

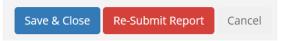
You will also see the status of the report change in the *Award Activities* section of your Award Dashboard. Click on the hyperlinked *Review/Resubmit* under Actions to make your changes.

Award Activities	Award Activities												
Show 10 v entries Search:													
Report 👘	Reporting Period	Created By 🛛 🕸	Date Created 🛛 🕸	Current Status	11	Actions	↓ ↑						
Financial Report	09/02/2022 09/23/2022	Katje Benoit	09/02/2022	Changes Requested		Review/Resubmit	J						

This will take you to your Closeout Report how you previously submitted it. Review "Note from the grantor" for instructions on how to edit your Closeout Report.



Make the necessary changes to your Closeout Report and re-submit.





Once your Closeout Report has been approved, you will receive an email from <u>Support@eCivis.com</u> notifying you that your grant has been successfully closed, with any notes from the grantor.

Your award has been successfully closed:

Program: Direct Award Test

Project: Direct Award Test Contract/Award Number: RI-2022-1234

You may still view your post-award activities in the eCivis Portal [mandrillapp.com].

Note from grantor: All reports have been submitted and approved.

For any questions pertaining to this award package, please contact your grantor at: <u>@omb.ri.gov</u>

Attached to that email will be a PDF Closeout Letter with basic details regarding your grant closeout:

Award Closeout Letter

Dear Katje Benoit,

This is to inform you that your award is now closed.

Program:	Direct Award Test				
Project:	Direct Award Test				
Closeout status:	Standard - Compliant				
Note from the Grantor:	All reports have been submitted and approved.				



You will see your award status update to Closed

 My Applications 	-								
🕈 My Awards	My Awards								
🛔 My Profile	Show 10 🗸	Show 10 v entries				Search:			
	Grant Title	Project Title 🎝	Award/Contract Number	Award Type	Award Status 🕼	Notification Date	Performance Period	Role ↓↑	Actions
	Direct Award Test	Direct Award Test	RI-2022-1234	N/A	Closed	08/08/2022	8/1/22 - 7/31/23	Owner	≡

You will still be able to view all reports and documentation by clicking on the hyperlinked *Grant Title* and navigating to the Award Dashboard.

All completed reports can always be revisited in a view-only screen by clicking *View Report/Task/Amendment* under the Actions column.

If you have any questions about your award after you have completed closeout, please contact your grantor directly.