RHODE ISLAND SPECIFIC GUIDE

Grants Network Updates

for Rhode Island Users

Contents

Introduction

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

Highlights

- RI has chosen to integrate eCivis with Rhode Island Finance Management system (RIFANS) to ensure grant data is captured at the transaction level; thereby, enabling Rhode Island users with robust grants management, compliance and reporting.

- For data to transfer from eCivis to RIFANs, RI users must set up their grants in eCivis first, for the eCivis system to autogenerate a unique **Rhode Island Grant Identifier (RIGID)**. The RIGID is a unique identifier that ties the GMS to line sequence(s) in RIFANS. The RIGID value populates the **Internal Grant ID** field, in eCivis.
    - The RIGID is created after the Grant is moved to the *Grant Awarded* stage, so there may be a period where you will not see the RIGID.
    - Do NOT enter a value into the **Internal Grant ID** field. Any data entered in the Internal Grant ID field will be overridden when the RIGID is autogenerated.
    - Do enter the 7-digit line sequence assigned by OMB into the **Internal Grant Name** field.

- Grants that are in the stage of "Grant Awarded", "Implementation", or "Closeout" will be included in the data transfer.

- Data is transferred on a nightly basis between eCivis and RIFIANs.

- RI users MUST set up their budgets within eCivis to enable grant related financial transactions to map from RIFANs to eCivis.

- Users should consult the Accounts and Control for specific user guide information for entering transactions in RIFANS directly.

- This User Specific Training Guide relates to the RI process of setting up grants, subprojects, and budgets in two scenarios:
1. 1 to 1 relationship between grant and tracking financials in RIFANS

2. 1 to many relationships between grant and tracking financials in RIFANs
    a. If you utilize subproject tracking per the SF-424A found in Appendix A, you must use the "Allocation" feature in eCivis.

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

Key **Takeaways**
- Enter, or move, your grant into the *Grant Awarded* stage to enable the eCivis-RIFANs integration

- Set up your budgets to enable RIFANs transactions to map to projects, subprojects and granular ID's according to how RI users report on the SF-424A Section A

- How to enter naturals/GL code in the grant budget, to accommodate RI specific tracking and allocation requirements
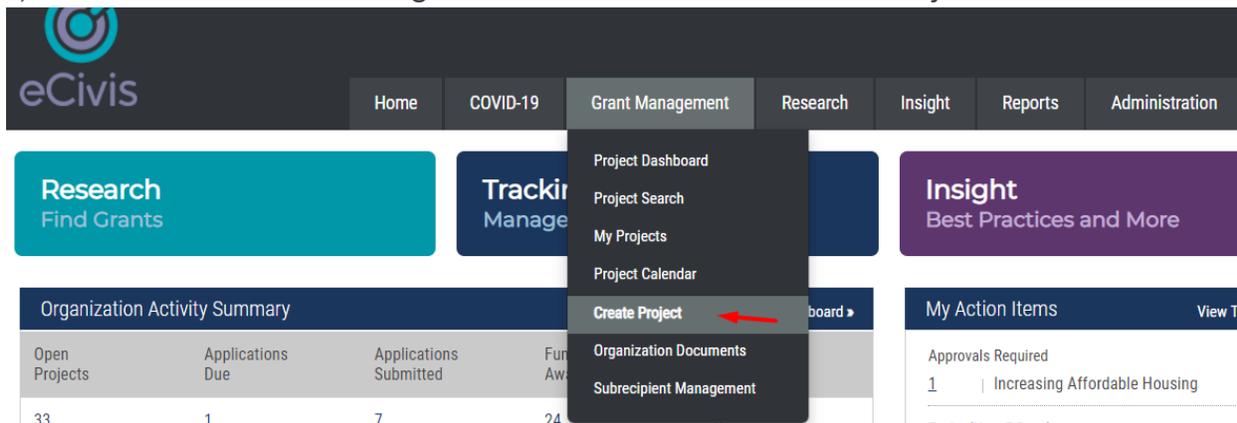
Part 1: RI Specific Grantee Pre-Award

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

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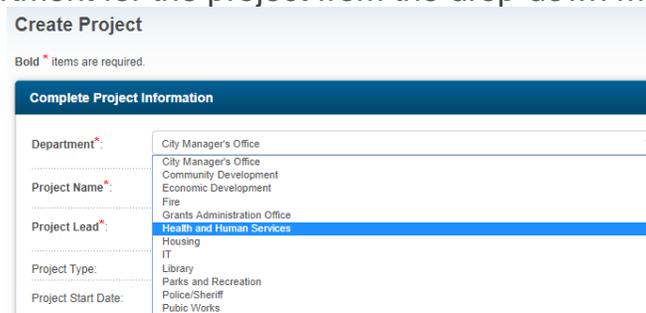
1 Create a Project

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

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

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

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

5) Determine if the project is a Construction or Non-Construction project and select the corresponding radio button. Select Non-Construction if the federal agency requires the SF-424**A**. Select Construction if the federal agency requires the SF-424**C**.

6) Add a Project Start Date and a Project End Date. These fields are required.

7) Add a brief Project Summary. This field is required and can be modified later.

8) Click "Save."

Create Project

Bold ★ items are required.

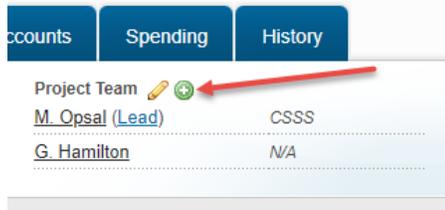9) You will be taken to your newly created Project Dashboard:

1.1 Define Your Team Members

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

1.1.1 Add Project Team Members

1) Click on the green plus sign icon beside "Project Team":


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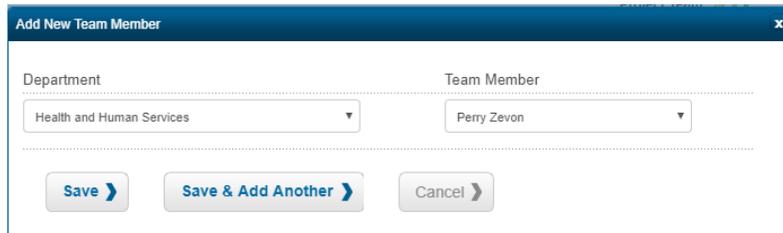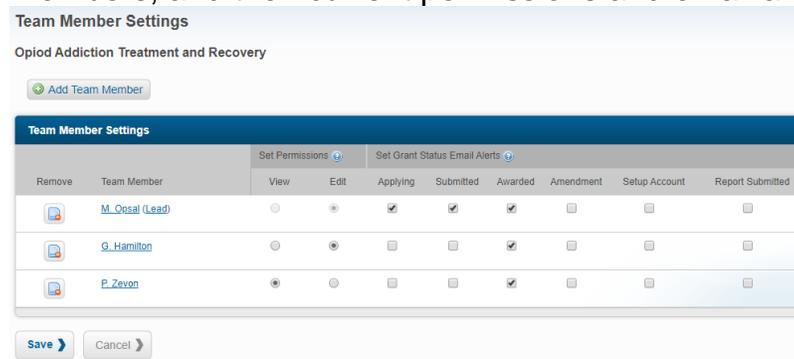

1.1.2 Manage Team Member Settings

3) Click on the pencil icon beside "Project Team"
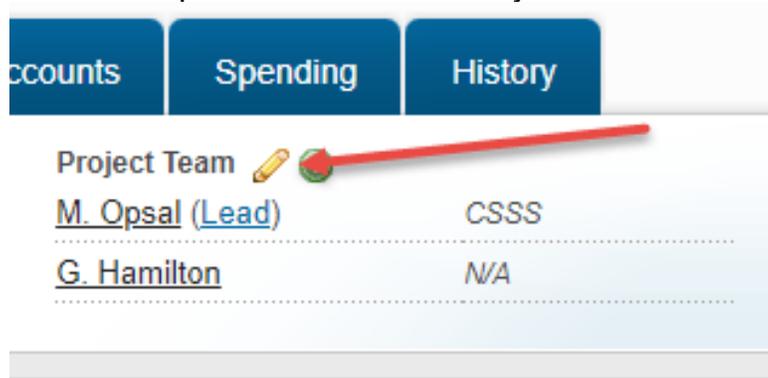
4) You will be taken to a new page that lists all of the current project team members, and their current permissions and email alert settings:

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

- View: A specific project team member can only see project and grant information, but not make changes.

- Edit: A specific team member can make changes to project settings, and grant information. All Team Leads will have "Edit" access by default.

6) The "Set Grant Status Email Alerts" section allows you to control the types of emails your project team members will receive.
    - **Applying:** Team Member will receive an email notification when a grant is in the "Application Preparation" stage within the project.
    - **Submitted:** Team Member will receive an email notification when a grant is in the "Application Submitted" stage within the project.
    - **Awarded:** Team Member will receive an email notification when a grant is in the "Funds Awarded" stage within the project.

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

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

2. Locate/Find Grant
Locate the grant you want to save to the project - search for your grant through the Grant Research Tool or locate the grant through your Organizational Funding. Each federal grant has a unique Federal Assistance Identification Number (FAIN). Only create (or save) 1 grant per FAIN in eCivis.
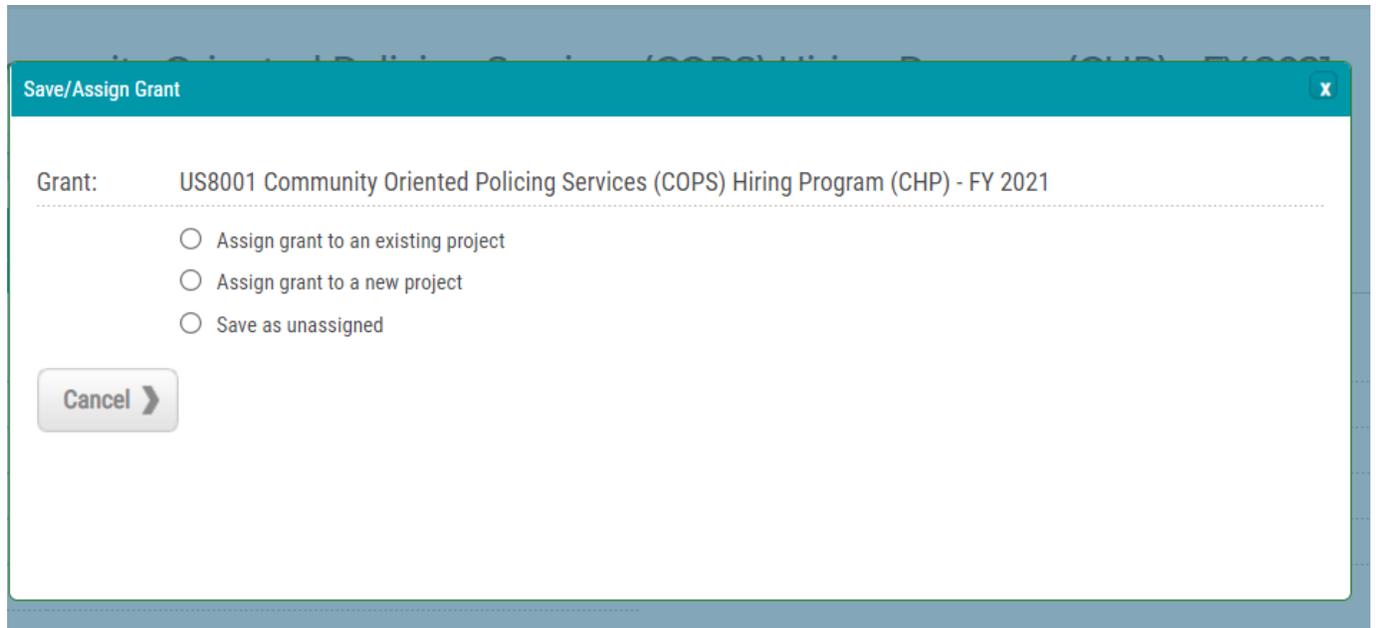
1. **Save and Assign Grant**
   3.1 Save Your Selected Grant
   Click this button to save a grant you are viewing to a project. This will let you manage the grant from initial application through all stages of the Grant Lifecycle. When you click "Save / Assign" a pop-up will appear:

1) Select whether you want to assign a grant to an existing project (recommended) or if you want to create a new project and assign the grant to that new project.
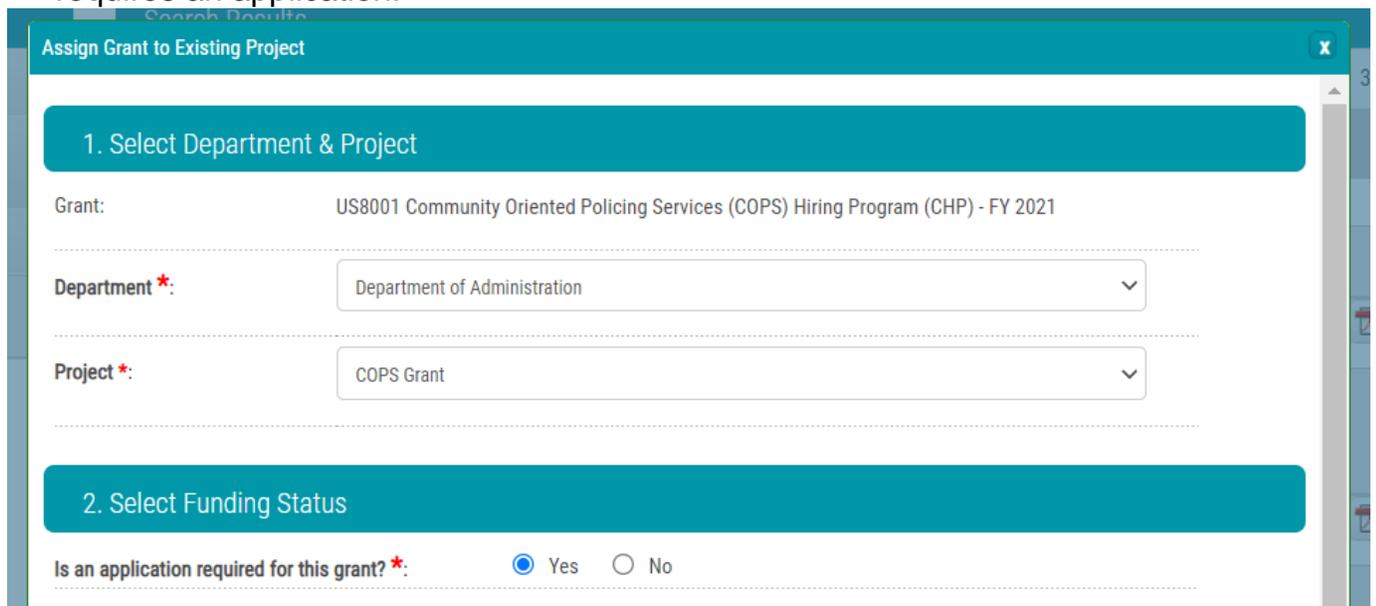
Save/Assign Grant   x

Grant: US8001 Community Oriented Policing Services (COPS) Hiring Program (CHP) - FY 2021

○ Assign grant to an existing project

○ Assign grant to a new project

○ Save as unassigned

Cancel ❯

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

Assign Grant to Existing Project   x

1. Select Department & Project

Grant: US8001 Community Oriented Policing Services (COPS) Hiring Program (CHP) - FY 2021

Department *:   Department of Administration   ˅

Project *:   COPS Grant   ˅

2. Select Funding Status

Is an application required for this grant? *:   ● Yes   ○ No

3) This will open a new field where you must select the grant status. When you make this selection, new fields will appear.
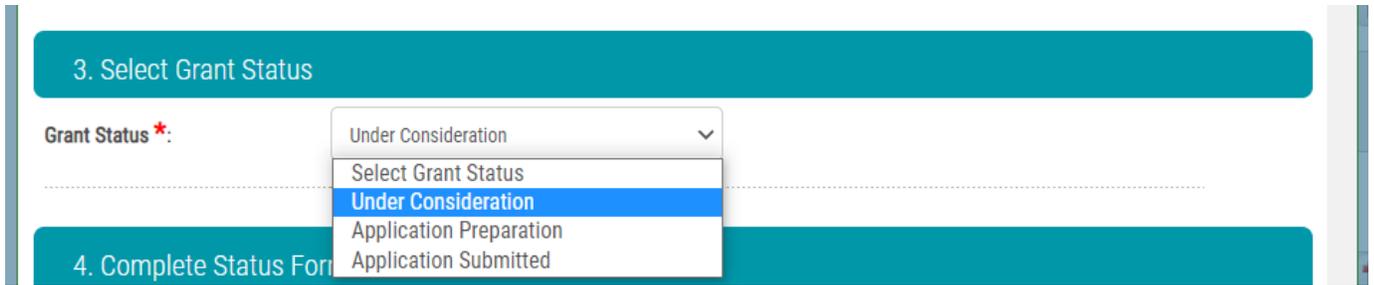
Different fields will appear depending on if you select "Under Consideration," "Application Preparation," or "Application Submitted." At all stages selecting a Grant Tag(s) is Required.
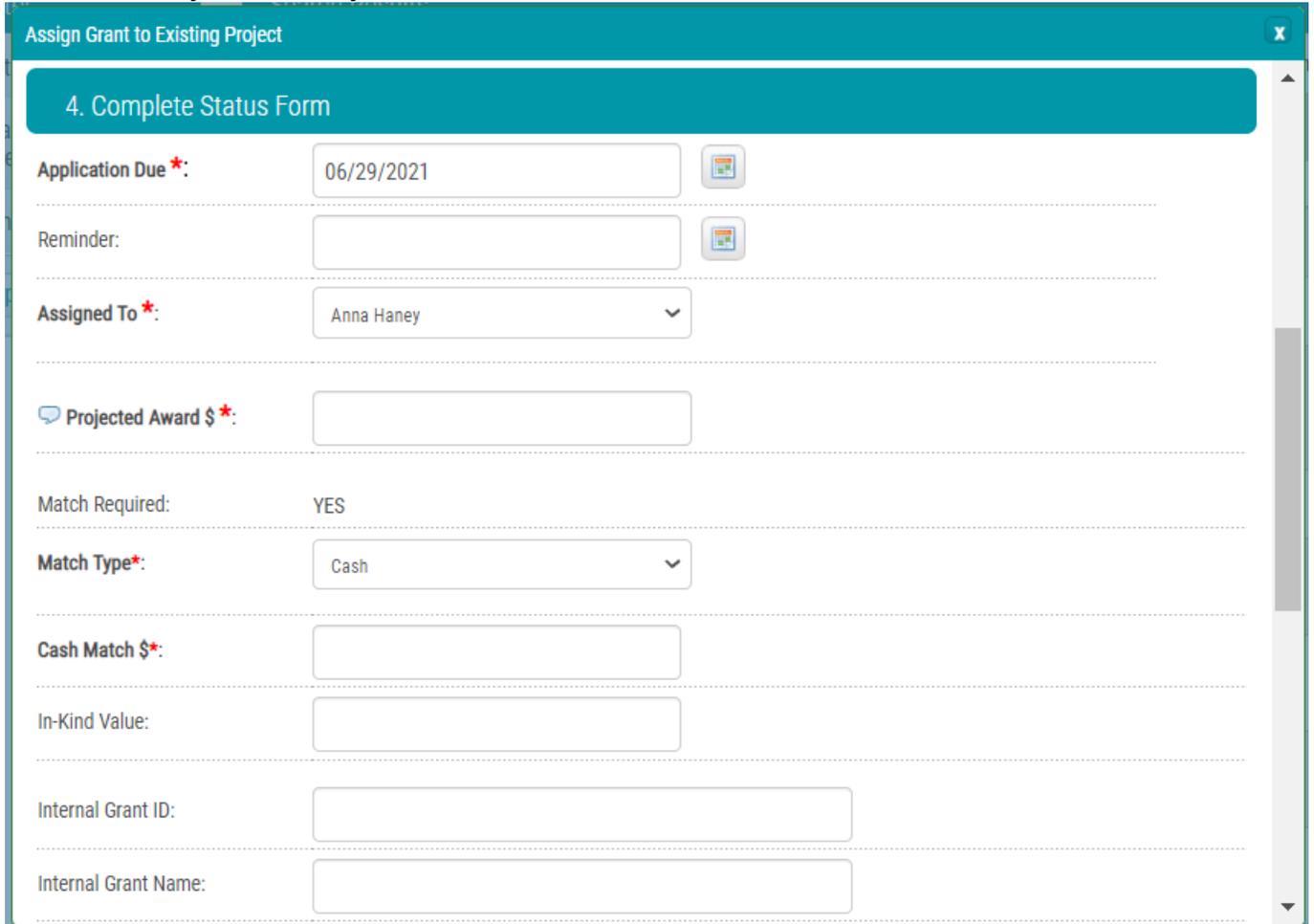
- ***Under Consideration***: It is required to select an appropriate Grant Tag(s). If one is not available, select the Grant Tag titled "N/A – no grant tags applicable". Finally, add any notes and attach any applicable files.
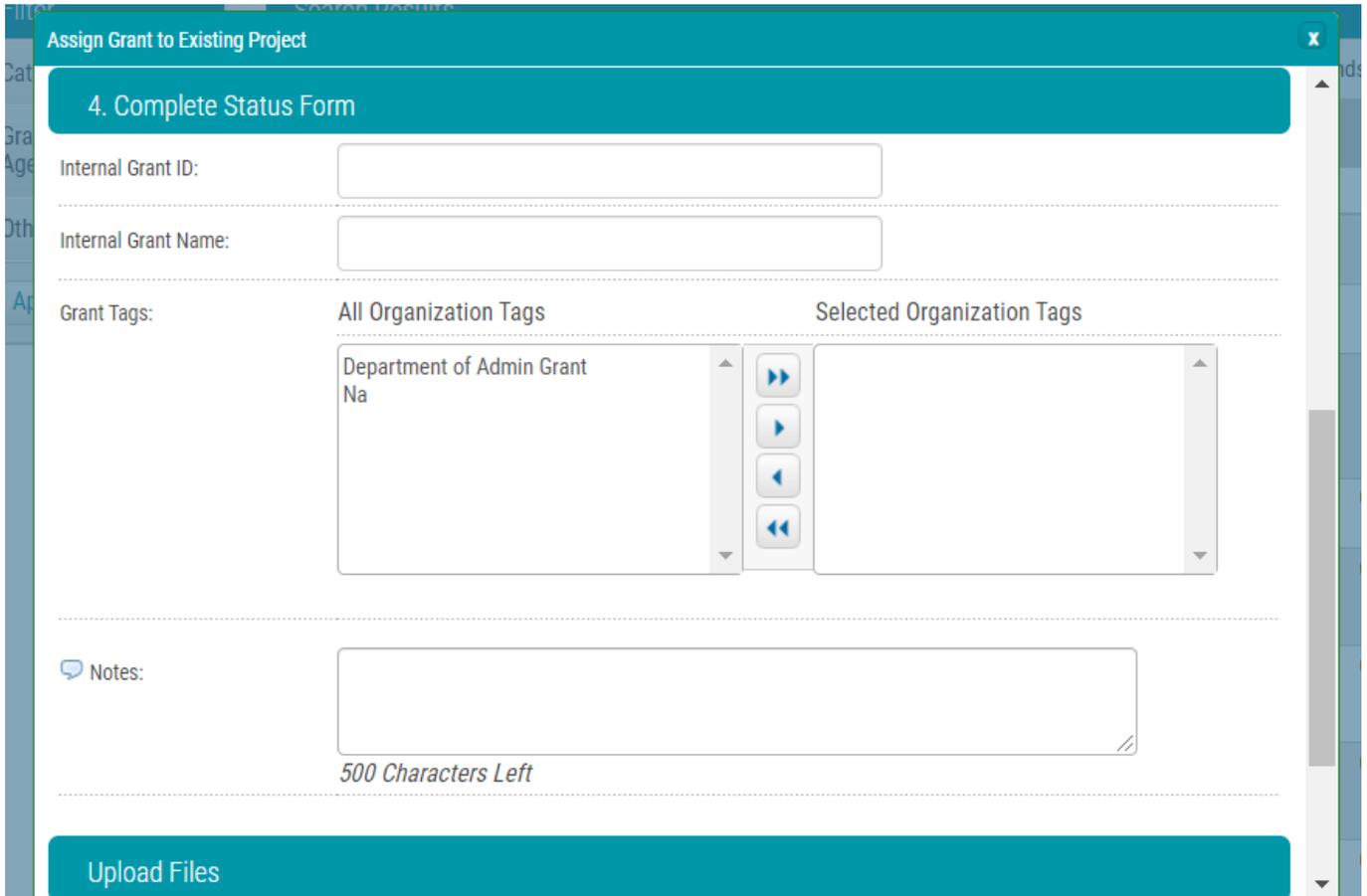
- ***Application Preparation:*** *Because* this status indicates that you are further along in the application, more information is required. You will need to enter an application due date, can enter a reminder, assign a project member, add

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

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

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

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

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

For migrated data, if you see a "0" in this field, please overwrite with the correct 7-digit line sequence(s), separated by a dash. Enter the applicable line sequence(s) at the level you are budgeting, <u>either</u> parent grant or child subproject.
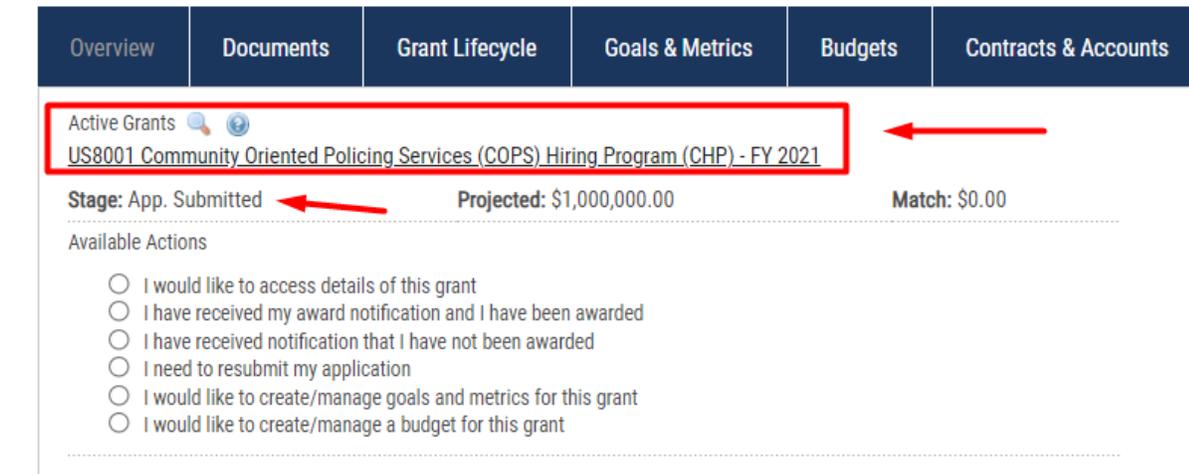
3.2 Save & View Your Selected Grant

After you click "Save," the grant will be saved to your project. If you wish to view the grant in your project, click the Grant Management Tab and select "My Projects."
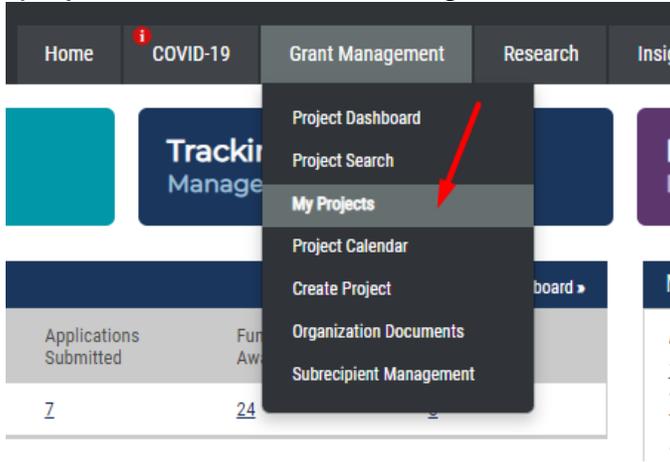
Then, locate your project by name, and click into it. There, you will see the grant saved in your project. From the Project Dashboard, you will see all the available actions for managing your newly saved grant:

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

2. **Budget Construction - Application Preparation Stage**

4.1 Putting your grant into "Application Preparation"

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

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

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

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

US16819 Rural Health Opioid Program - FY 2017

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

Available Actions

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

4.2 Create Your Grant Budget

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

US16819 Rural Health Opioid Program - FY 2017

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

Available Actions

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

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

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

Budget Creation Wizard   **x**

ORG0509 eCivis Demo Fund

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

Budget Template: *   RI Construction

                           RI Construction
                           RI Non Construction   Uniform Guidance Help
                           SF-424A Non-Construction
                           SF-424C Construction   As you develop your application use our digital reference
                                                         tools to search the Uniform Guidance

Save & Close ❱   **Cancel ❱**

3) Click "Save & Close" when you have selected the Budget Template you wish to use.

4) You will be taken to a screen that displays your new budget template.

4.3 Budget Template Review
You are required to create your budget in the Pre-Award Stage.

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

1) ***Revision Report:*** Automatically generates an Excel spreadsheet that shows budget revision data such as a history of revisions, who performed each saved revision, and any notes added by team members.

2) ***Indirect Costs:*** Select the type of indirect cost calculation you want to use in the budget from the drop-down menu:
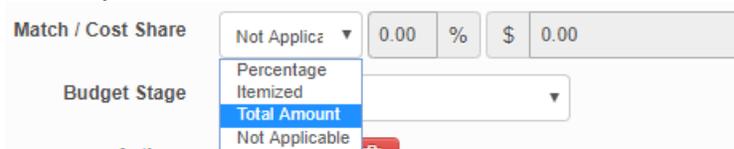

NOTE: If you select "De Minimus Rate," the indirect cost percentage will become 10%. If you select "Negotiated," the percentage cost field will become editable:

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

drop-down menu:

4) **Budget Stage:** If you are in the Pre-Award stage and the grant is in the "Application Preparation" stage, the only available option here will be "Pre-Award."

5) **Save:** Save any revisions you made to the budget.

6) **Discard Changes:** Close and do *not* save revisions made to the budget.

7) **Delete Report:** Delete the entire report. This cannot be undone.

4.4. Create a Budget Table

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

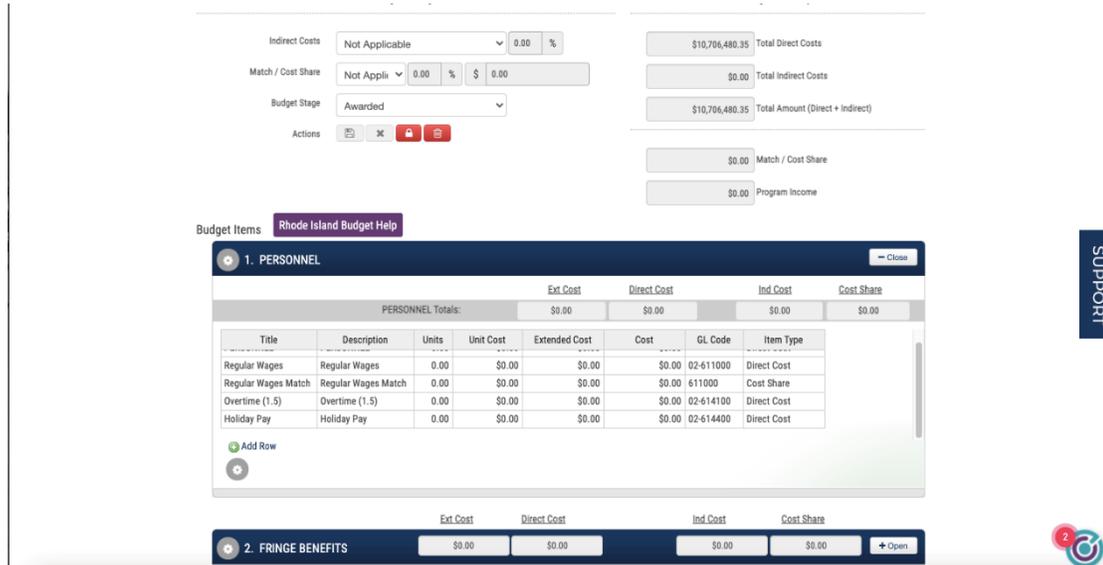1) Click "+Open" in the table where you wish to add costs. This will expand the table view.
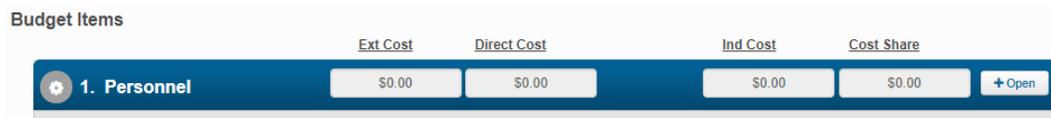
2) Click the gray gear icon on the lower left corner of the expanded view, then click the table icon:
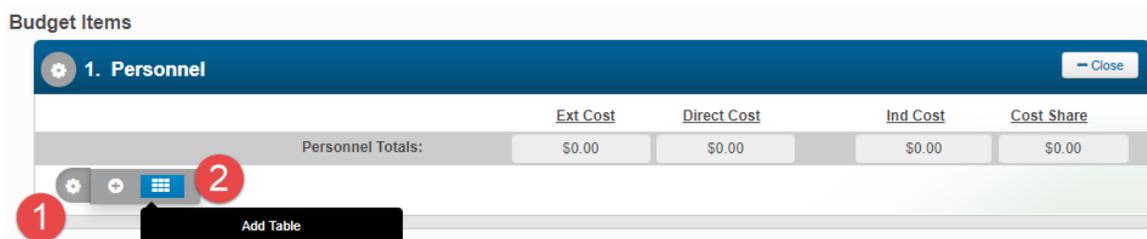
3) Fill out the appropriate cells with the necessary information as indicated below. It is

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

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

Notes:

- This is a critical field used to associate the line item with multiple data sets concatenated into a prescribed format

- This field and data work in conjunction with the RIGID defined above, to map future transactions to the correct budget line item, in the correct grant-project. It MUST be entered in the exact format with precise text for transactions to link to the correct line item when they are exported from RIFANS and imported into GN

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

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

5) Cost Share should be checked if this is a match line item. Enter only the natural in the GL Code field for each match line item. Any transactions with a non-federal Account Source in RIFANS will be mapped to your match line items by RIGID and natural.

6) Click "Close" when you are finished with the Uniform Guidance Help screen.

7) If you wish to add more items to a specific budget category, click the "Add Row" link:

4.5 Budget Narrative

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

1) Click "+Open" on the Budget Narrative bar. This will expand the editable field view.

2) Enter your budget narrative by copying/pasting from another document into the body of the budget narrative field, or enter text by typing directly into the field:

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

4) When you have entered your budget narrative, click "Save" to save the narrative. Or, you can click the PDF icon to export a PDF copy of your budget narrative:
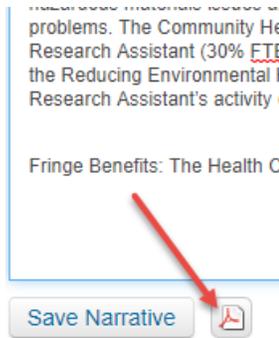
4.6 Budget Documents

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

1) Click "+Open" on the Budget Documents bar. This will expose all your document upload options.

2) Upload documents for Pre-Award, Award, and/or Post-Award stages of your
   budget by clicking their respective "Add File" links:
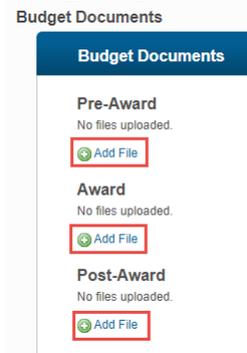
3) After you click "Add File," click "Choose File" in the box that appears and select the file(s) that you wish to upload. Click "Upload" to finish:
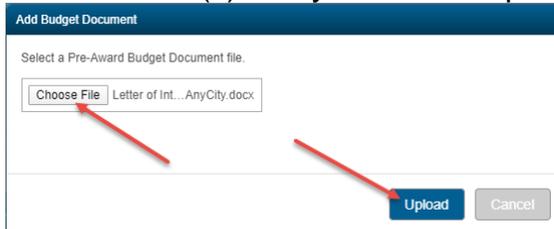
4) The Budget Documents section will list the file(s) that you uploaded, along with the file size, date of upload, team member name who uploaded it, and the ability to delete the file (red trash can icon):

Pre-Award

Filename	Size	Uploaded	Uploaded By	Actions
Letter of Intent AnyCity	11.1 Kb	01/30/2020	M. Opsal	🗑

Part 2: RI Specific Grantee Post Award

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

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

1.1 Grant Awarded – Enter a New Award Notification

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

US16317 Tribal Opioid Response (TOR) Grants - FY 2021

Stage: App. Submitted	Projected: $500,000.00	Match: $0.00

Available Actions

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

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

1) Select ***I have received my award notification and I have been awarded*** – this takes you to the Grant Status – Grant Awarded Page

- Fill out the required and necessary information for your notice – make sure you fill out the fields with the red asterisk as they are required

- You will need to enter the RIFANS line sequence into the **Internal Grant Name** field. If you have more than one line sequence number, you can enter all of them dash separated. Example: 1234567-4567891- XXXXXXX

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

- You will need to enter the FAIN in the **Grantor Contract Number** field.

Complete Status Form

Grant:	ORG0025 Promotion of the Arts_Partnership Agreements_61-19
Internal Grant ID:	IOtdRwVwrUezE74WFUBIWQ==
Internal Grant Name:	0
💬 Projected Award $*:	0.00
Do you consider this a competitive grant? *:	○ Yes ● No
Award Notification*:	07/01/2019
💬 Awarded $*:	1,160,100.00
Match Required*:	Yes
Match Type*:	Cash
💬 Cash Match $*:	735,800.00
💬 In-Kind Value:	
Contract Start Date:	07/01/2019
Contract Close Date:	12/31/2022
Reminder:	
Award Type:	○ Advance Payment ● Reimbursement
DUNS Number:	
Grantor Contract Number:	

Grant Tags:

All Organization Tags	Selected Organization Tags
COVID Award - Tydings NA no tags applicable Tydings Period	COVID Award

Click here to MOVE THIS option

💬 Notes:

500 Characters Left

Allocation Option

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

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

Grant Status - Grant Awarded

Opiod Addiction Treatment and Recovery

Complete Status Form	
Grant:	US16317 Tribal Opioid Response (TOR) Grants - FY 2019
Internal Grant ID:	
Internal Grant Name:	
Do you consider this a competitive grant? *:	⚪ Yes ⚪ No
Award Notification*:	
💬 Awarded $*:	350,000.00
Match Required*:	NO
Match Type:	N/A ▾
Cash Match $:	
In-Kind Value:	
Contract Start Date:	
Contract Close Date:	
Reminder:	
Award Type:	⚪ Advance Payment ⚪ Reimbursement
DUNS Number:	

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

Upload Files	
💬 Attach Files:	📁

Save ❯   Cancel ❯

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

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

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

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

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

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

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

2.0 Setting up a Child Budget for a Subproject

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

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

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

2.1.2 Application Submitted Stage

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

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

1) Select ***I have received my award notification and I have been awarded*** – this takes you to the Grant Status – Grant Awarded Page

- Fill out the required and necessary information for your notice – make sure you fill out the fields with the red asterisk as they are required

Grant Status - Grant Awarded

Opiod Addiction Treatment and Recovery

Complete Status Form	
Grant:	US16317 Tribal Opioid Response (TOR) Grants - FY 2019
Internal Grant ID:	
Internal Grant Name:	
Do you consider this a competitive grant? *:	☐ Yes ☐ No
Award Notification*:	
Awarded $*:	350,000.00
Match Required*:	NO
Match Type:	N/A ▼
Cash Match $:	
In-Kind Value:	
Contract Start Date:	
Contract Close Date:	
Reminder:	
Award Type:	☐ Advance Payment ☐ Reimbursement
DUNS Number:	

2) Select the allocation options that fit how you will use your grant funds.
   A) **State as Grantor/Pass-Through Entity**: To make funds available for pass-through funding:
   Select "Yes" the funds are available for use as pass-through funding. You will need to allocate the quantity of pass-through funds that are available for pass-through funding:
   - Note: Pass through funding is for subawards, **not for contracts**.

Allocation Option

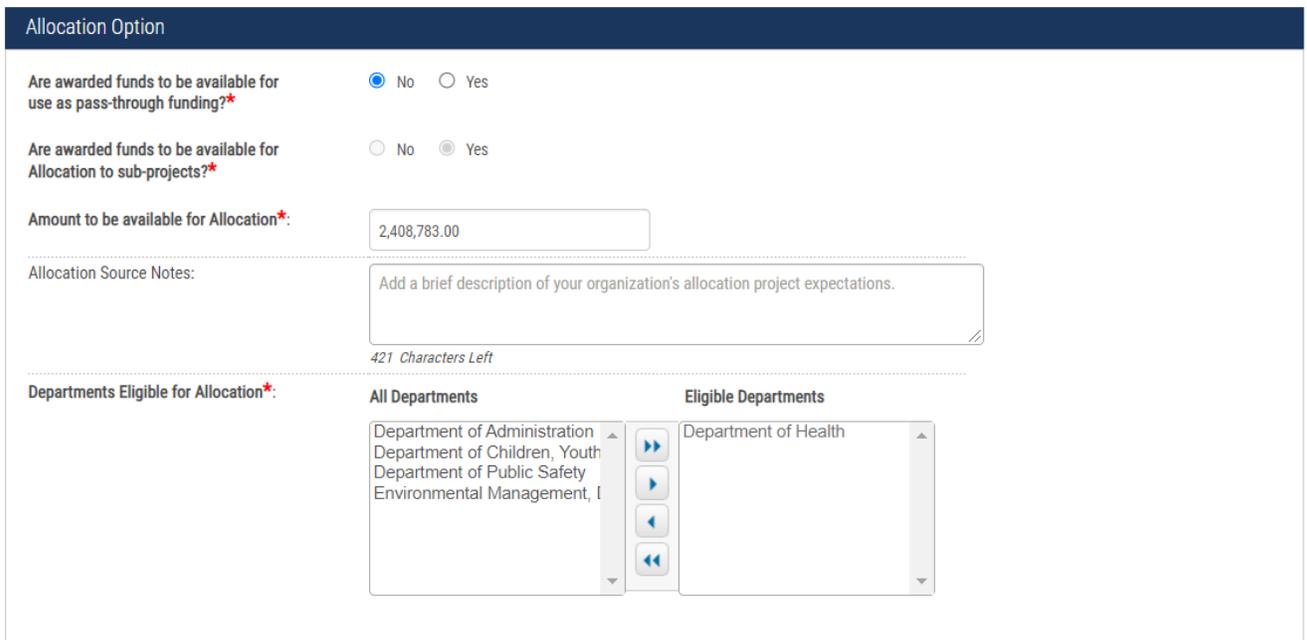| Are awarded funds to be available for use as pass-through funding?*	☐ No ☑ Yes
Amount to earmark for pass-through funding*:	350,000.00

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

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

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

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

Allocation Option			
Are awarded funds to be available for use as pass-through funding?*	● No ○ Yes		
Are awarded funds to be available for Allocation to sub-projects?*	○ No ● Yes		
Amount to be available for Allocation*:	2,408,783.00		
Allocation Source Notes:	Add a brief description of your organization's allocation project expectations.		
	421 Characters Left		
Departments Eligible for Allocation*:	**All Departments**		**Eligible Departments**
	Department of Administration Department of Children, Youth Department of Public Safety Environmental Management, E	▶▶ ▶ ◀ ◀◀	Department of Health

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

Upload Files	
💬 Attach Files:	📁

Save ❯ Cancel ❯

4) Now your grant is in the "Grant Awarded" stage, you MUST allocate it to subprojects to enable subproject tracking. Remember, this applies:

- If you utilize subprojects in the SF-424A, or
- For migrated awards with multiple line sequences only, if you are establishing a separate child subproject for each line sequence.

5) Navigate to the **Research Tab,** Select **Allocation Sources**. You will see the grant you have made available for subprojects, click **Assign Allocations**. Under the **Actions** column, select **Assign to a New Project**:

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

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

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

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

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

2.1.2 Award Projected Stage

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

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

3.0 Verify your Umbrella Project and Grant IDs

The eCivis award hierarchy is:

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

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

1) Click on the Project Options button:

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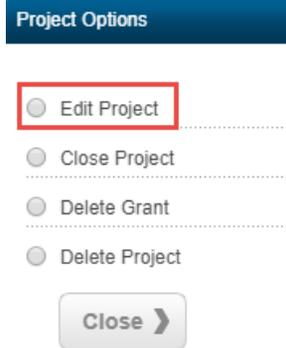
3) The **Internal Project ID** should be blank. The **Project Name** should begin with the CFDA number, as shown in the screenshot below. The **Project Summary** should briefly describe the grants covered under the umbrella Project.

Complete Project Information

Department:	Department of Health
Project Name:*	93.898- Cancer Prevention and Control Programs for State, Territorial and Tribal Organizatic
Project Lead:	Anna Haney
Project Type:	● Non-Construction ○ Construction
Project Start Date:	
Project End Date:	
Internal Project ID:	RIGID Number
Internal Project Name:	DO NOT ENTER DATA
Project Summary:*	FY21 allocation

4) Click on the Contracts & Accounts Tab:

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

Department: Department of Health

Data Integration Options   Project Options

Overview	Documents	Grant Lifecycle	Goals & Metrics	Budgets	Contracts & Accounts	Spending	History

Active Grants 🔍 ❓
ORG0009 Cancer Prevention and Control Programs for State, Territorial and Tribal Organizations - FY21

Stage: Grant Awarded   **Awarded:** $2,408,783.00 *   **Match:** $780,124.00

Available Actions

Project Team ✏️ ➕
A. Haney (Lead)   Program Manager

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

4.0 Confirm Final Grant Budget

4.1 Review Stored Budget (Awarded Stage)

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

1) If you already entered a budget in pre-award, you may edit it now if necessary, or you may create your budget at post-award.

2) Keep in mind that You MUST enter a budget for your grants. Budgets must be entered at the parent or child level, but not both. If you do not enter budgets, transactional data cannot be mapped, reported upon, or viewed in association with the grant. RI Users are required to enter a GL Code at this stage.

GL Code: Rhode Island Specifics

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

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

- If you need to add additional line items to track transactions, you may do so by clicking "Add Row"

  - **GL Codes are required for RI to enable RIFANS mapping**

  - Title: Natural Title
  - Description: Natural Description

  - GL Code:

    - For Federal Expenditure line items:

      - Account Source- Natural Account (XX-YYYYYY)

        - Example: 02-611000

      - Account Source Identifier for Federal Expenditures is "02"

    - For Match line items:

      - Natural Account **only** (611000)

  - Notes:

  - This is a critical field used to associate the line item with multiple data sets concatenated into a prescribed format

  - This field and data work in conjunction with the RIGID defined above, to map future transactions to the correct budget line item, in the correct grant-project. It MUST be entered in the exact format with precise text for transactions to link to the correct line item when they are exported from RIFANS and imported into GN

  - If you have line-item rows from the pre-award budget that you no longer need, please delete those rows to ensure your post-award budget is tracking the exact amount awarded.

3) For each budget line, you must select Direct, Indirect, or Cost Share

4) In the Project Dashboard, click the name of the grant for which you wish to confirm
   the final budget. When the Available Actions list appears, click "I would like to create/manage a budget for this grant":

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

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

Available Actions

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

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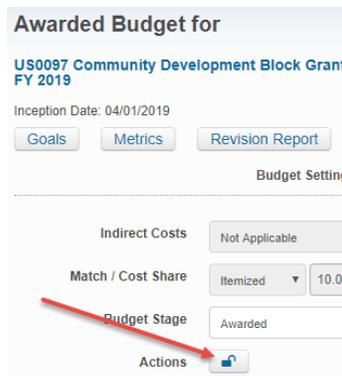
Awarded Budget for

US0097 Community Development Block Grant FY 2019

Inception Date: 04/01/2019

Goals	Metrics	Revision Report

Budget Setting

Indirect Costs	Not Applicable
Match / Cost Share	Itemized ▼ 10.0
Budget Stage	Awarded
Actions	🔓

You will see a pop-up that warns you that the budget is locked. Click "Yes, Continue"
to proceed:
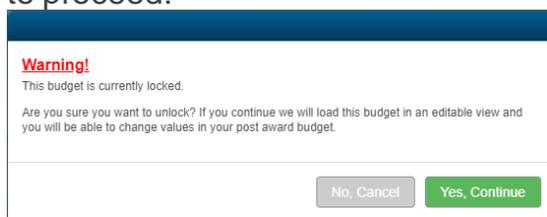
Warning!
This budget is currently locked.

Are you sure you want to unlock? If you continue we will load this budget in an editable view and you will be able to change values in your post award budget.

[No, Cancel]   [Yes, Continue]

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

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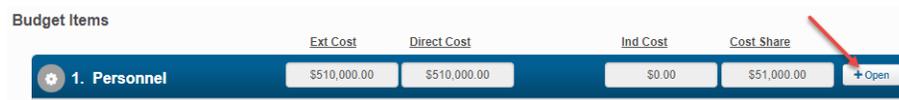
	Ext Cost	Direct Cost	Ind Cost	Cost Share	
⚙ 1. Personnel	$510,000.00	$510,000.00	$0.00	$51,000.00	+ Open

7) Edit any of the data you see by double-clicking into the cell you wish to edit:
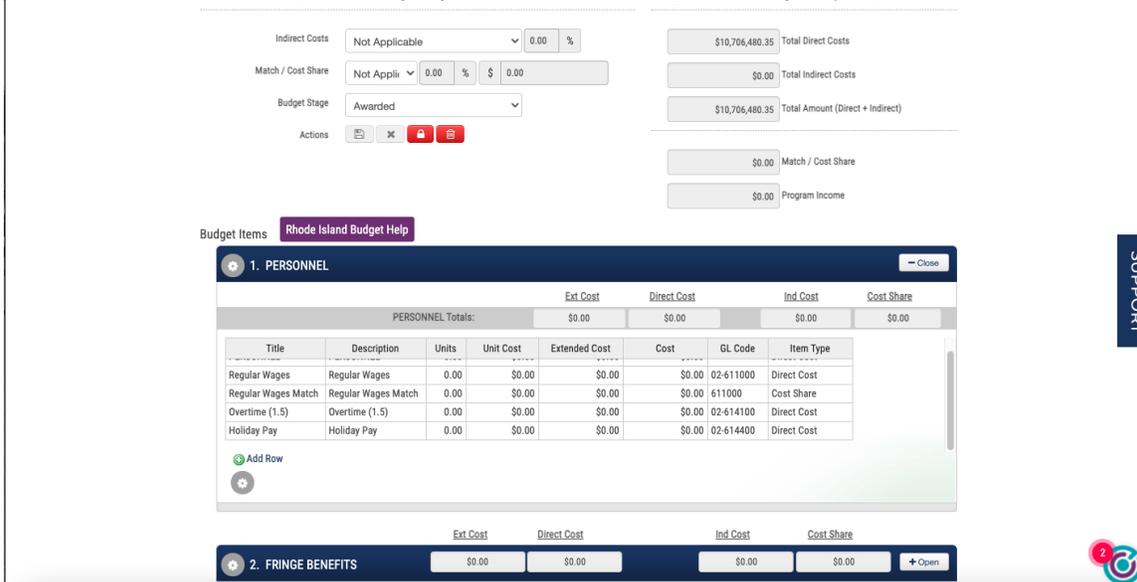
NOTE: If you wish to edit the "Item Type" cell, click in the cell once to select from a
drop-down menu:
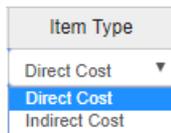
8) If you need to add a line item, click "Add Row":
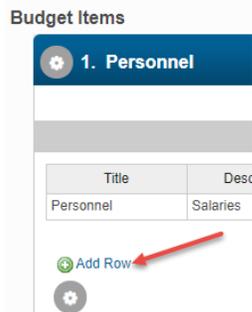
Enter the necessary data into the newly added row.

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

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

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

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

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

4.2 Review Stored Budget (Post-Award Stage)

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

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

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

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

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

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

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

7) Click "Generate Report":

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

Budget Items

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

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

Transactions to resolve.

4.3 Uncategorized Transactions

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

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

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

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

Post-Award Budget for

US0097 Community Development Block Grant (CD FY 2019

Inception Date: 04/01/2019

Goals	Metrics	Revision Report

Budget Settings

Indirect Costs	Not Applicable	
Match / Cost Share	Itemized ▼	9.93 %
Budget Stage	Post-Award	
Actions	💾 ✖ 🔒 🗑	

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

Uncategorized Transactions — Close

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

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

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

10) Click "Add Row":

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

12) Click "Save":

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

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

Post-Award Budget for

US0097 Community Development Block Grant (CD
FY 2019

Inception Date: 04/01/2019

| Goals | Metrics | Revision Report |

Budget Settings

Indirect Costs	Not Applicable
Match / Cost Share	Itemized ▾ 9.93 %
Budget Stage	Post Award
Actions	💾 ✕ 🔒 🗑

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

Appendix A: RI SF-424A All Components

BUDGET INFORMATION - Non-Construction Programs

SECTION A - BUDGET SUMMARY

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

SECTION B - BUDGET CATEGORIES

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

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

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

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

SECTION C - NON-FEDERAL RESOURCES				
(a) Grant Program	(b) Applicant	(c) State	(d) Other Sources	(e) TOTALS
8. NBCCEDP		$70,836.00	$433,487.00	$504,323.00
9. NCCCP				
10. NPCR-1 (Core) - Matching and MOE		$86,212.00	$142,676.00	$228,888.00
11. NPCR-2 (Screening)			$46,913.00	$46,913.00
12. TOTAL *(sum of lines 8-11)*		$157,048.00	$623,076.00	$780,124.00

SECTION D - FORECASTED CASH NEEDS				
	Total for 1st Year	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
13. Federal	$2,408,783.00	$602,195.75	$602,195.75	$602,195.75	$602,195.75
14. Non-Federal	$780,124.00	$195,031.00	$195,031.00	$195,031.00	$195,031.00
15. TOTAL *(sum of lines 13 and 14)*	$3,188,907.00	$797,226.75	$797,226.75	$797,226.75	$797,226.75

SECTION E - BUDGET ESTIMATES OF FEDERAL FUNDS NEEDED FOR BALANCE OF THE PROJECT				
(a) Grant Program	FUTURE FUNDING PERIODS (Years)			
	(b) First	(c) Second	(d) Third	(e) Fourth
16. NBCCEDP	$1,512,970.00			
17. NCCCP	$439,781.00			
18. NPCR-1 (Core)	$315,294.00			
19. NPCR-2 (Screening)	$140,738.00			
20. TOTAL *(sum of lines 16-19)*	$ 2,408,783.00			

SECTION F - OTHER BUDGET INFORMATION	
21. Direct Charges: $2,330,024.00	22. Indirect Charges: $78,759.00
23. Remarks: For NBCCEDP indirect costs are not permitted. For NCCCP, NPCR-1, & NPCR-2, the federally approved indirect cost rate is 19.3% of direct costs less equipment and contracts (subawards).	

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Appendix B: Data Dictionary:

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

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

Notes:

   - This is a critical field used to associate the line item with multiple data sets concatenated into a prescribed format

   - This field and data work in conjunction with the RIGID defined above, to map future transactions to the correct budget line item, in the correct grant-project. It MUST be entered in the exact format with precise text for transactions to link to the correct line item when they are exported from RIFANS and imported into GN

   - If you have line-item rows from the pre-award budget that you no longer need, please delete those rows to ensure your post-award budget is tracking the exact amount awarded.

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

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

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

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