

STATE AS GRANTOR PRE-AWARD USER GUIDE

This user guide begins the State as Grantor process for agencies issuing subawards to non-state entities.

Grants Management
Office

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Introduction

Who should be viewing this user guide?

State agency users who will be issuing a subaward (including subawards to state colleges and quasi's, but excluding transfers to other state agencies). Refer to [Rules and Regulations for Grant-Making Involving Federal Funds, 220-RICR-20-00-2](#), for details on applicability (§ 2.3) and respective requirements for competitive, non-competitive, and first-come, first served programs (§ 2.6).

What steps should I have already completed before moving forward?

- 1) Enter the federal funding source(s) that will be funding this program. Information can be found in the [Grantee \(Prime Recipient\) Federal Award Management User Guide](#) in the Getting Started section.

NOTE: Programs that must review applications before federal funds are received: Only one source of funds is required to publish a solicitation. If necessary, that source can be a temporary placeholder. Use the [Support Form](#) for assistance.

- 2) Complete a Subrecipient vs. Contractor Determination Tool
 - a. U.S. Office of Management and Budget guidance (2 CFR 200.331) requires federal award recipients to make case-by-case determinations as to whether each agreement entered into for the disbursement of federal program funds casts the entity receiving the funds in the role of a sub-recipient or a contractor. Complete the Subrecipient vs. Contractor Determination Tool found on the [GMO website](#) and maintain document for records.

What if I was approved for a Non-Competitive/Direct to Award waiver?

Agencies who were approved through the Non-Competitive/Direct-to-Award (DTA) process can follow the same instructions as the competitive process in Phase 1, Phase 2, and Phase 5.

Simultaneously, agencies issuing a Non-Competitive Program should reference [Appendix D](#) to ensure they are following any additional required and recommended actions and take note of any alternate guidance.

First Come, First Served/Rolling Subaward Programs

If permissible under the terms and conditions of the Federal award(s), Agencies may conduct a first come, first served subaward issuance process. For the purposes of pre-award setup, follow the steps outlined for Competitive Programs. Please review section 2.6.3 of the [State Regulation](#) for more information about the differences between Competitive and First Come, First Served Programs.

Key Terminology

Grants Network: Main GMS webpage (gn.ecivis.com).

Application and Review Manager (ARM): Supplemental platform of Grants Network specifically for grantors.

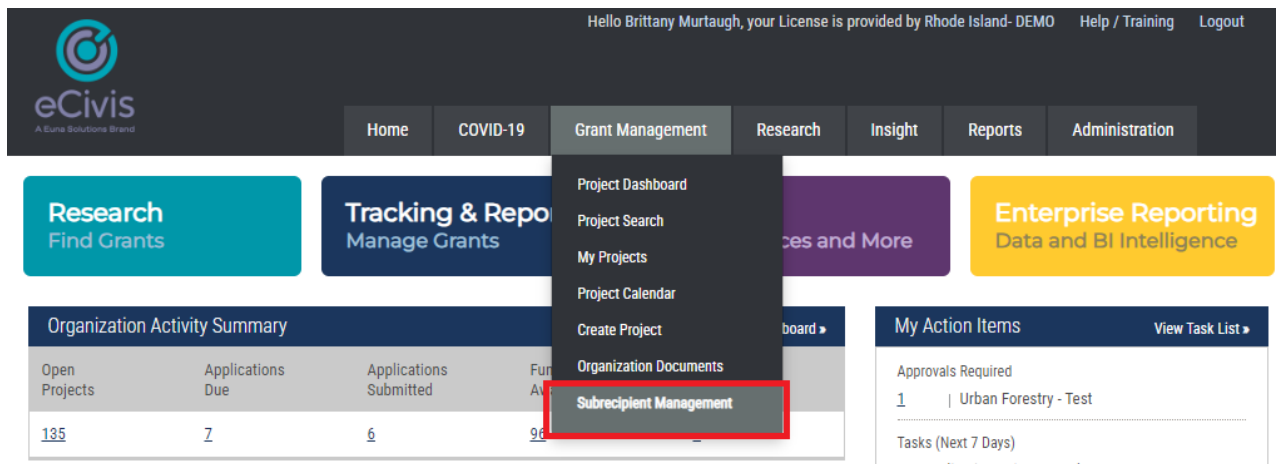
NOTE: See [Appendix K](#) for additional defined terminology.

Phase 1: Creating a New Program

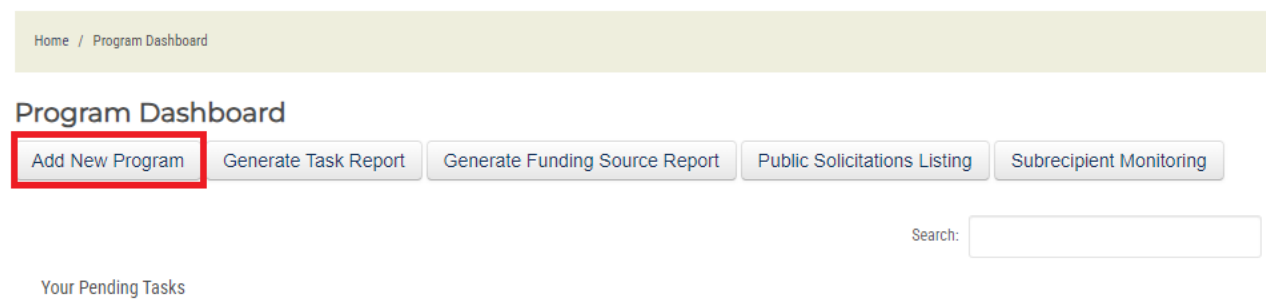
1.1. How to Create a New Program

Creating a new program is the first step in the State as Grantor process. The program itself will start with the creation of a solicitation, which is the backbone of the program, or each subaward funding cycle. Follow the steps below to create the program.

- 1) Login to the GMS (Euna/eCivis Grants Network)
- 2) On the Homepage, hover over the *Grant Management* tab and select *Subrecipient Management*.



- 3) In the upper left-hand corner, select *Add New Program*.



- 4) A pop-up window will appear. Fill out the information requested.
 - a. Please enter a name for the program: Create a name for the program. This will be the name viewable to agency users, applicants, and future subrecipients. Ensure it is clear and recognizable to a wider audience. Additionally, if this is a reoccurring program, it may be helpful to add a year to differentiate among funding cycles.
 - b. Please select a solicitation type: Select *Application and Peer Review Process* unless a Non-Competitive/Direct-to-Award Waiver has been approved for this program.
 - c. Please select a department: The departments accessible will be listed here. Some agencies have multiple “departments” set up in GMS. If that is the case, ensure the program is created in the department the funding source(s) originates from.

- d. Please select a template application: This option should be greyed out and not clickable. With the ARM enhancement selecting a template application at this stage is no longer needed. This question will be phased out in future updates.
 - e. Listing: This should always be set up *Public* unless there is a special circumstance (i.e. Approved Non-Competitive Direct-to-Award Waiver, other exception granted by GMO)
 - f. Is this program a subprogram?: Leave selection as is - functionality is not used by Rhode Island.
- 5) Once the information is complete, select *Create Program*.

Create New Program

Please enter a name for your new program:
Test Program

Please select a solicitation type:
Application and Peer Review Pr ▾

Please select a department:
DOA - New Grants Managemen ▾

Please select a template application:
-- Select Application ▾

Program Setup Tip:
The information provided here assists applicants who are seeking out funding assistance. This information will be visible publicly if the "Public" radio button is checked.

Listing:
☒ Public
☐ Private

Is this program a subprogram?:
☐ Yes
☒ No

Create Program Cancel

- 6) This will bring open the “Program Detail” page. See next section for overview.

1.2. Program Detail Page Overview

The Program Detail page will be the home base for this grant program from pre-award, the awarding process, post-award, and closeout stages. This guide will focus on the areas of the Program Detail page relevant to the Grantor Pre-Award Process only.

- Edit Solicitation: This will be where the details of the program are entered.
- Application Management: This is where users will access the Application and Review Management (ARM) feature for competitive programs once the solicitation is complete.
- Delete: If this program was created by mistake, or it will no longer move forward, use the *Delete* button to remove the program while it is still in Draft status.

Program Detail

Environmental Justice Program FFY25 (TEST) Draft

Department: DOA - New Grants Management Office

Total Funding: \$0.00

Application Period: N/A

Subrecipient Reporting ▾

Edit Solicitation

Application Management ▾

Delete

Award Recommendation Approval

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

Phase 2: Editing the Solicitation

Now that the program has been created, the solicitation needs to be edited. The solicitation is the public facing information and details that will build the unique aspects of the program. The solicitation consists of 9 tabs (or 8 tabs for Non-Competitive / Direct to Award). See below for how to complete each tab.

2.1. Editing Solicitation Summary

- 1) From the Program Detail page, select *Edit Solicitation* and then select *Yes, Continue*

Program Detail

Environmental Justice Program FFY25 (TEST) Draft

Department: DOA - New Grants Management Office

Total Funding: \$0.00

Application Period: N/A

Subrecipient Reporting ▾

Edit Solicitation

Application Management ▾

Delete

Warning!

Are you sure you want to leave this page?

Yes, Continue

No, Cancel

- 2) The solicitation will automatically open to the “Overview” tab. Follow the instructions below to determine how to complete this tab.

- 3) The first 5 tabs are public facing, while the last 4 tabs are internal only.
 - a. Public: Overview, Eligibility, Financial, Contact, Files
 - Be sure to include all information for applications in these first 5 tabs.
 - b. Internal: Review, Submission, Goals, Approval

2.2. Edit Solicitation: Overview tab

The Overview tab will be the first information an applicant sees when reviewing the solicitation and deciding if they are going to apply. See information about how to complete each field included in this tab.

- 1) Title: The title chosen when creating the program will auto populate. This can be changed now if needed. (Required field)
- 2) Start/End Date: Not editable in Grants Network. These fields will auto populate with the start/end date indicated in ARM during the application build in [Phase 4](#). (Required field)
NOTE: [State regulation](#) requires competitive and first come, first served programs be posted for a minimum of 21 consecutive calendar days.
- 3) Fiscal Year: Enter the grant/program/fiscal year of this funding cycle. (Optional field)
- 4) ID: Rhode Island does not utilize this field and it can be left blank.
- 5) CFDA/ALN: Enter the Assistance Listing Number (formerly CFDA) for the federal award(s) funding this program. (Optional field)
- 6) Reference URL: A website with additional information on the subaward program that the applicant should reference (e.g. link to state agency website) can be entered here. If no other websites need to be referenced, leave this field blank. (Optional field)
- 7) Listing Availability: This will auto-populate with the selection made when creating the program. This can be changed if needed/allowable. (Required Field)
- 8) Summary: This textbox should contain the main information applicants will need to know about the program. (Required field). Information in this box should include the following:
 - a. Program summary and key details
 - b. Information on application deadline
 - c. General information on accessing resources (see [Appendix B](#) for reference)

Step 1 of 8 * = Required for Section Completion

Title: Apple Tree Grant Program FY25

Fiscal Year: 2025

Application Start Date: 01/01/2025

Application End Date: 12/31/2025

ID:

CFDA/ALN: 12.345

Reference URL: https://controller.admin.nj.gov/grants-managem...

Listing Availability:

- ☐ Public
- ☒ Private

Summary:

Program Summary and Key Details

Details

Information on Application

Details

Program and Technical Support Assistance

Details

body p b u

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

Save **Done**

2.3. Edit Solicitation: Eligibility tab

The Eligibility tab should provide an applicant all the information they need to determine a) if they are eligible to apply for and receive funds, and b) if their proposed activities are eligible.

- 1) **Eligible Applicants Checkboxes:** Select all checkboxes of populations who would be eligible to apply for this program. These checkboxes are for informational purposes only and will not automatically prevent an ineligible entity/applicant from applying. (Required field)
- 2) **Eligibility Notes:** Provide clear, detailed information on eligible and/or ineligible activities. Also expand on the information selected in the checkboxes. If the federal award has specific guidance on who is eligible, provide all that information here. (Required field)

Step 2 of 8 * = Required for Section Completion

Eligible Applicants:

- ☒ Local Government
- ☐ Academic Institutions
- ☐ Consortia
- ☐ Native American Tribe
- ☐ Non Profits
- ☐ Other
- ☐ Private Sector
- ☐ Schools/School Districts
- ☒ State Government

Eligibility Notes:

Eligibility Requirements

Details on who is and is not eligible for this program.

Provide any federal award guidance on eligibility, if applicable.

body p

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

Save **Done**

2.4. Edit Solicitation: Financial tab

The financial tab is where the financial information for the program will be available. This will not only be important for transparency but will also impact the awarding and post-award processes. Please ensure all information is accurate before publishing.

NOTE: Programs that must review applications before federal funds are received: Only one source of funds is required to publish a solicitation. If necessary, that source can be a temporary placeholder. Use the [Support Form](#) for assistance.)

- 1) **Total Funding:** This section should hold the total funding that will fund the subaward programs for the entire award. If using multiple funding sources to fund this program, they all must be entered here before issuing any subawards. To add funding sources, see steps below. (Required field)
 - a. Select *Add Funding Source* and a pop-up will appear to add the funding source.

- b. Choose Funding Type:
 - **Pass-Through Funding:** Funding that was saved and assigned to a Project in GMS and marked available for pass-through.
 - See the [Grantee \(Prime Recipient\) Federal Award Setup and Management](#) user guide for additional details.
 - **Organizational Funding:** Funding that was set up by the GMO (examples include: Match funding, Placeholder funding, funding from IAA-FF's).
 - c. Select Department (Pass-Through Only): If the agency utilizes multiple departments, choose the department the federal funding source being added was created under.
 - d. Select Project (Pass-Through Only): Select the Project this federal funding was saved/assigned to.
 - e. Select Grant (Pass-Through Only): Select the Grant under that Project as the funding source (some project may have been assigned multiple grants).
 - f. Select Funding Source (Organizational Only): All Organizational Funding sources that the user account has been approved to view will appear here. Select the correct one.
 - g. Total Available (Both): Shows the total available balance remaining in this funding source.
 - h. Total Allocation: Enter the amount to allocate to this solicitation from the “Total Available”.

i. *Select Save Funding.*

The image displays two side-by-side screenshots of the 'Add Funding Source' form. Both forms have a dark blue header with the title 'Add Funding Source' and a close button (X).
 The left form shows the following selections:
 - Choose Funding Type: Pass-Through Funding (dropdown)
 - Select Department: Department of Administration (dropdown)
 - Select Project: Test (dropdown)
 - Select Grant: FD12693 National Police Dog Foundation (dropdown)
 - Total Available: \$1,999,000.00 (text input)
 - Total Allocation: \$1,000,000.00 (text input)
 - Buttons: Save Funding (blue), Close (grey)
 The right form shows the following selections:
 - Choose Funding Type: Organizational Funding So (dropdown)
 - Select Funding Source: Training Source- DEMO (dropdown)
 - Total Available: \$499,999,999.00 (text input)
 - Total Allocation: \$10,000,000.00 (text input)
 - Buttons: Save Funding (blue), Close (grey)

NOTE: Funding Sources can be updated/changed at any point of the Grantor process. A funding source can be changed independently if it occurs before the awarding process. If the funding source needs to be changed after the awarding process, please contact the GMO.

- 2) Display the total funding amount on the external solicitation page: Select “Yes” for this if applicants should be able to view the total dollar amount available for this program. (Optional field*)

NOTE: Per [State Regulation](#), “Identification of the funding source(s) and the estimated or actual total amount of available funds” is required for competitive and first come, first served programs.

- 3) Permit Multi-Term Projects: Leave this selected “No”, this is a functionality Rhode Island is not using. (Optional field)
- 4) Matching Required?: Indicate whether applicants, if selected, will be required to provide match funds. (Required field)
- 5) Award Amount: Enter the award amount range applicants could expect if awarded. (Optional field)
- 6) Number of Awards: Indicate how many subawards will be issued from this solicitation. (Optional field)
- 7) Average Award Size: Indicate the average dollar amount of an award for a subrecipient. (Optional field)
- 8) Financial Notes: Provide detailed information about the funding sources for this program, and any other financial related information relevant to applicants. (Required field)

Overview ✓ **Eligibility** ✓ **Financial** ✓ **Contact** ✗ **Files** ✗ **Submission** ✗ **Goals** ✗ **Approval** ✗

Step 3 of 8 * = Required for Section Completion

Total Funding \$100,000.00.*

0% ORG0032 Test 3 (\$100,000.00)

Assign Default Payment Allocation **Add Funding Source**

Display the total funding amount on the external solicitation page:
☒ Yes ☐ No

Permit Multi-Term Projects:
☐ Yes ☒ No

Matching Required? *
☒ Yes
☐ No
☐ Recommended

Matching Type: * Cash

Award Amount: 5,000.00 (min) 10,000.00 (max)

Number of Awards: 10

Average Award Size: 7,500.00

Financial Notes.*

Federal Funding Information

Provide details here

body p

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

Save **Done**

2.5. Edit Solicitation: Contact tab

The Contact tab will be where applicants go if they have a question about the program. Ensure there is accurate and detailed information about who to contact for the agency. Generally, this is a single point of contact for the program that can ensure questions and responses are posted on the Files tab for all potential applicants to view (competitive programs).

- 1) Contact/Help: This should be the email address applicants should reach out to with questions about the program. This may be an individual's email, or an office/program email. (Required field)
- 2) Office: Enter the name of the office or division within the agency. (Optional field)
- 3) Program Contact: Enter the name and information of the program contact(s). (Required field)
- 4) Program Contact & Application Address are the same: Select this box to copy what was written in the Program Contact textbox to the Application Address textbox. (Optional field)
- 5) Application Address: Enter the office address for the agency/department or repeat the email address. (Required field)
- 6) Contact Notes: This textbox allows more space to provide additional contact information. It is recommended that state agencies include information to the Grants Management Office website and resources. See [Appendix B](#) for reference.

Overview Eligibility Financial Contact Files Submission Goals Approval

Step 4 of 8 * = Required for Section Completion

Agency/Department: Department of Administration

Contact/Help: * brittany.murtaugh@doa.ri.gov

Office: Grants Management Office

Program Contact: *
Brittany Murtaugh
Department of Administration - Accounts and Control

☐ Program Contact & Application Address are the same.

Application Address: *
One Capitol Hill
Providence RI, 02908

Contact Notes: *

Source **B** *I* U

Questions about Application Questions or Program?

Please contact brittany.murtaugh@doa.ri.gov.

In Need of Technical Assistance?

If you experience any technical difficulties with eCivis Portal while submitting your application, please submit a [User Support Form](#) to the Grants Management Office for assistance. Technical questions can be addressed via this form, but all questions relating to the grant program, application questions, and content of the solicitation should be sent to the contact listed in the Contacts tab.

Resources

Resources and user guides are available for applicants to assist with eCivis Portal Access, application submission guidance, requirements for applying to and accepting an award, and much more. Please visit the [Resources for Subrecipients](#) webpage for more information.

body p

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

Save Done

2.6. Edit Solicitation: Files tab

The Files tab allows uploads of documents that applicants would need to review and/or complete during the application process.

- 1) **Current Files:** List of files uploaded. See below for how to add files (Optional field)
 - a. Select *Add File* to add a file to the solicitation.
 - b. Chose a “File Label” (or create one) and select *Choose File* to choose a file from the computer.
 - c. Once selected, select *Upload File* to add to the solicitation.

Current Files

No data available in table

Add File

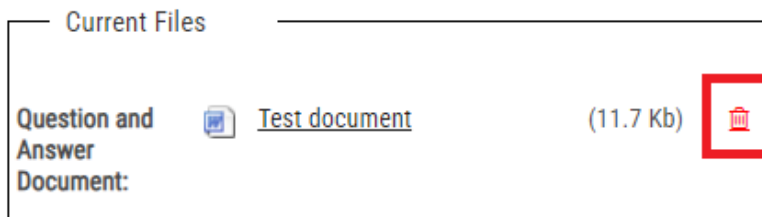
File Label: *
Other

Other Label: *
Question and Answer Document

File: *
Choose File Test document.docx

Upload File Close

d. To remove a file, select the red trash can next to the appropriate file.



- 2) **File Notes:** Provide descriptions or additional information about each of the files uploaded. This will assist applicants in knowing if the file is for informational purposes, or if the file will be a required part of the application. Additionally, it is recommended that agencies include dates the files were last updated if multiple versions will be uploaded (e.g., FAQs). (Optional field)

A screenshot of a multi-step application process. At the top is a navigation bar with tabs: Overview (green check), Eligibility (green check), Financial (green check), Contact (green check), Files (green check), Submission (red X), Goals (red X), and Approval (red X). The main area is titled "Step 5 of 8" with a red asterisk and the text "* = Required for Section Completion". On the left, under "Current Files", is a list of four files: "Budget: Program Specific Instruct..." (12.3 Kb), "Guide: How to Submit an Applicat..." (1.3 Mb), "Guide: eCivis Portal - Access an..." (449.6 Kb), and "FAQ: FAQ for Applicants and Su..." (332.2 Kb). Each file has a red trash can icon. Below the list is an "Add File" button. On the right, the "File Notes:" section contains a rich text editor with a toolbar (Source, Bold, Italic, Underline, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink). The editor contains three sections of text: "Program Specific Budget Instructions:", "How to Submit an Application:", and "FAQ for Applicants and Subrecipients:", each followed by a paragraph of descriptive text. At the bottom of the editor is a "body p" label and a scroll bar. Below the editor is a blue information icon with the text "Use the tabs to complete the solicitation. Make sure to click Save when making changes." At the bottom right are "Save" and "Done" buttons.

NOTE: See [Appendix B](#) for recommendations on files to add to the solicitation.

2.7. Edit Solicitation: Review tab

The Review tab is the first tab that begins the Grantor only visibility. All the tabs moving forward are only viewable to the grantor and are for set-up purposes only. This tab is where reviewers for the program applications will be added.

- 1) Review Committee: List of individuals reviewing applications. If it is unknown who will be on the review committee, this can be left blank and reviewers can be added at a later date. (Optional field*)

NOTE: Reviewing applications is required by the [State Regulation \(200-RICR-20-00-2.6\)](#), but technically optional in the GMS. If reviews are completed outside of GMS, the review record must be uploaded to GMS.

- a. Select *Add Reviewer* to add the first member of the review committee.

Please enter review committee members:

Review Committee

No data available in table

Add Reviewer >

- b. A popup window will appear, enter the information about the reviewer and select *Add Reviewer*.

Add Reviewer

First Name:*
Jane

Last Name:*
Smith

Email:*
jane.smith@grants.gov

Add Reviewer >

Close >

- c. The reviewer will appear in the Review Committee list. Continue to add reviewers or use the red trashcan icon to remove a reviewer from the list.

Review Committee

Jane Smith brittany.murtaugh@doa.ri.gov

NOTE: Adding a reviewer to the solicitation is not going to send them an automatic email or allow them to immediately complete reviews. Later in the process a user will need to assign reviewers to

applications. Until then, the review listed here is only available as an option but does not have access to the application(s).

- 2) Textbox: This textbox is not utilized by Rhode Island and has no function. This can be left blank.

Overview ✓ Eligibility ✓ Financial ✓ Contact ✓ Files ✓ Review ✓ Submission ✗ Goals ✗ Approval ✗

Please enter review committee members:

Review Committee		
Brittany	Murtaugh	brittany.murtaugh@doa.ri.gov
Laura	Sullivan	laura.e.sullivan@doa.ri.gov

Add Reviewer ➤

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

Save ➤ Done ➤

2.8. Edit Solicitation: Submission tab

The Submission tab contains some of the most important setup functionality of the solicitation. Ensure all of the steps below are followed carefully. Once the solicitation is published, the Budget Development and Detailed Financial Reports option **cannot** be changed.

- 1) Accept Multiple Applications Per User: Select “Yes” for a singular user account to be able to submit multiple applications for this program. The ability/inability to submit multiple applications is checked against the applicant’s email address, not organization. (Required field)
- 2) Budget Development: Budget Development enables budget categories in the application and budgetary controls at the category level in the post-award stage. (Required field)
 - a. All agencies should select “Yes” for awards that will be over \$10,000 (Business Process Policy).
 - If selected “Yes”, select the “RI Non-Construction – Subaward” (most common) or “RI Construction – Subaward” budget template, unless the agency has created a custom budget template. However, the standard RI Construction/Non-Construction budget templates fulfill most agencies’ needs.
 - If selected “No”, a built-in budget template will not be added to the application process. Additionally, once awarded, subrecipients will not be able to report against a built-in budget

in their Financial Reports/Payment Requests. For these reasons, the GMO suggests always selecting “Yes” for Budget Development.

NOTE: To request a custom budget template, submit a User Support Form. Please allow additional time for custom budget template to be created.

NOTE: This selection cannot be changed once the solicitation is published.

- 3) Contract Number: Each subaward must have a unique contract/award number. GMS can autogenerate subaward contract numbers. Select “Yes” & enter the preferred prefix. (Required field)
 - a. If selecting “No”, agency users will be required to manually enter a unique contract number for each subaward during the award recommendation process.
 - b. The Contract/Award Number should match the Subaward Number on the Subaward Agreement. Typically, agencies use an alphanumeric format.
- 4) Collect Detailed Financial Reports: This option allows agencies to enter custom GL Codes and/or Descriptions into the selected budget template. (Optional field). This is for reporting purposes only. Internal controls remain at the budget category level.
 - a. If this field is checked, select *Detailed Financial Report Options* to add GL Code fields.



- b. A popup will appear, enter the custom GL code information. See [Appendix C](#) for example.
- 1) Require Invoice Number of Financial Reports: A unique invoice number is required for financial reports (payment requests) to be processed in the state financial system. Checking this option will prevent a financial report from accidentally getting approved without an invoice number and failing to load to be paid in the state financial system. It is recommended that agencies check this box. (Optional field)
- 2) Require Receiver ID on Financial Reports: The Receiver ID is repurposed in GMS for Natural Account Code. If left blank, all financial reports will default to the subaward natural (654130) when they load in the state financial system. If the agency uses a different subaward natural, it is recommended to check this box, so it prompts the approver to enter a natural account code. If the agency uses the subaward natural (654130), the field can be left unchecked. (Optional field)

- 3) Track Program Income with Financial Reports: This functionality is not currently being used by the State of Rhode Island, no selection/change is needed. (Optional field)

The screenshot shows the 'Financial' tab selected in the top navigation bar. The main content area is divided into two columns. The left column contains the following sections:

- Budget Development:** A question asking if applicants should create a budget within the eCivis Portal. The 'Yes' radio button is selected. A note states: 'Once a solicitation has been published, the budget template may not be changed.' Below this is a dropdown menu showing 'RI Non Construction'.
- Contract Number:** A question asking if Grants Network should autogenerate a contract number. The 'Yes' radio button is selected. Below this is a text input field with 'APPLETREE25' and a note: 'Contract Number prefix must be unique for your Organization. A -XXXX will be appended to all contract numbers.'
- A checkbox labeled 'Collect Detailed Financial Reports' is checked.
- A button labeled 'Detailed Financial Report Options' with a right arrow.
- Three checkboxes for financial report requirements: 'Require Invoice Number on financial reports' (checked), 'Require Receiver ID on financial reports' (unchecked), and 'Track program income with Finance Reports' (checked).
- Under 'Track program income with Finance Reports', three radio buttons are shown: 'Additive' (selected), 'Subtractive', and 'Apply to match'.

The right column is currently empty.

2.9. Edit Solicitation: Goals tab

The Goals tab allows agencies to track numerical goals for their subrecipients in the post-award stage. Subrecipients can report on these goals in the post-award phase and applicants will be given the option to respond to goal prompts during the application process. If the goals for the subrecipient are not numerical, it is not recommended to use this functionality.

- 1) To add a goal to the application and program, select *Add New Goal*.

Please enter the goals you have for this program. These goals will be included in the application and post award process.



- 2) A popup will appear, enter the title of the goal and the target units for that goal. If there are not established program-level target units, enter zero. Select *Save Goal* once information is entered.

Add Solicitation Goal

Goal Title:*

Target Units:*

Save Goal
Close

3) To add a subgoal, select *Add Subgoal*. Enter a Subgoal Title and then select *Save Subgoal*.

Add Solicitation Goal

Goal Title:*

Target Units:*

Add Subgoal

Subgoal	Actions
# of Animal Rescues Served	Edit Delete
# of Bookstores Served	Edit Delete
# of Restaurants Served	Edit Delete

Save Goal
Close

4) The new goal will now appear in the Goal table. Users can go back and Edit Goal, Delete Goal, or continue to add more goals as needed.

Add New Goal

Search:

Goal	Target	Actions
Provide training to local non-profits (hours)	500.00	Edit Goal Delete Goal

- 5) Goal Notes: Provide additional information for applicants while they complete their application.

(Optional field)

NOTE: Goals can be edited after the solicitation is published

Overview ✓ Eligibility ✓ Financial ✓ Contact ✓ Files ✓ Submission ✓ Goals ✓ Approval ✗

Step 7 of 8 * - Required for Section Completion

Please enter the goals you have for this program. These goals will be included in the application and post award process.

Add New Goal >

Search:

Goal	Target	Actions
# of Small Businesses Served	100.00	Edit Goal Delete Goal

10 records per page

← Previous 1 Next →

Goal notes may be used to provide instructions to your applicants during the application process. All notes entered here will appear to applicants when entering their goals on their application or anytime the goals are viewed.

Save > Done >

2.10. Edit Solicitation: Approval tab

The Approval tab is where the approval workflows for all grantor processes are determined. Processes for recommending applications for approval, approving financial reports, to closing out the awards all have approval workflows entered here. Approval workflows that are assigned while creating the solicitation can be edited at any time throughout the duration of a subaward program.

Additional functionality for the post-award phase can be set up in the approval workflows, such as: providing specific instructions for Activity and Financial Reports, adding acknowledgement statements, and setting a standard cadence for reporting. Details and instructions for this functionality can be found in the [Grantor Approval Workflows \(User Guide\)](#). See [Appendix A](#) for details on how to create user groups for use in the following approval workflows.

- 1) Recommendation Approval: Approval workflow is triggered when an award recommendation has been created. This workflow occurs before or after the applicant is notified of their tentative award. Users in the Recommendation Approval workflow will confirm the subaward details, budget, goals/subgoals (if applicable) and the subaward agreement is attached to the recommendation before it is sent to the applicant for subaward acceptance.

Once the Award Recommendation is approved, using whichever approval workflow chosen by the agency, the award package is sent to the subrecipient for them to review, make any changes, and accept or decline. (Required Field)

NOTE: This approval workflow will require the review of the Subaward Agreement and appropriate appendices.

- 2) Final Award Approval: Approval workflow after applicant has accepted the award package. This workflow is the last approval before the applicant is considered awarded and is moved to the post-award phase. Users in the Final Award Approval workflow will ensure that the applicant entity has signed and uploaded their subaward agreement. (Required field)

Once the Final Award Approval is approved, using whichever approval workflow chosen by the agency, the applicant officially becomes a subrecipient. Subrecipients can then request funds for reimbursement, submit activity reports, manage their project team, submit amendments, etc.

- 3) Activity Report Approval: If an agency chooses to utilize Activity Reports, this workflow is triggered when a subrecipient submits an Activity Report for review. Subrecipient progress on Goals and Subgoals will be updated via Activity Reports. The instructions box can be used to provide more detail on what a subrecipient needs to include in their Activity Report, such as back up documentation, etc. Subrecipients can also report on their goals in Activity Reports. (Required field)
- 4) Financial Report Approval: Approval Workflow that reviews and approves financial reports (requests for reimbursement/invoices). The instructions box can be used to provide more detail on what a subrecipient needs to include in their Financial Report (Payment Request), such as back up documentation, etc. (Required field)

NOTE: This approval workflow requires additional certification language to comply with UGG 2 CFR 200. See [Appendix B](#) for how to enter required certification language.

- 5) Amendment Approval: Approval workflow for subrecipient-initiated amendments. Includes all amendment types except financial (e.g., performance period end date extension, changes to goals/subgoals target units, etc.). Once the Grantor Amendment is approved internally, using whichever approval workflow chosen by the agency, the amendment is sent to the subrecipient for them to review, make any changes, and accept or decline. (Required field)
- 6) Amendment Approval with Finance: Approval workflow for subrecipient-initiated amendments with financial components/changes (e.g., moving money between budget categories, increase or decrease to award amount, etc.). Once the Grantor Amendment with Finance is approved internally, using

whichever approval workflow chosen by the agency, the amendment is sent to the subrecipient for them to review, make any changes, and accept or decline. (Required field)

- 7) Grantor Amendment Approval: Approval workflow for grantor-initiated amendments. Includes all amendment types except financial (e.g., performance period end date extension, changes to goals/subgoals target units, etc.). Once the Grantor Amendment is approved internally, using whichever approval workflow chosen by the agency, the amendment is sent to the subrecipient for them to review, make any changes, and accept or decline. (Required field)
- 8) Grantor Amendment Approval with Finance: Approval workflow for grantor-initiated amendments with financial components/changes (e.g., moving money between budget categories, increase or decrease to award amount, etc.). Once the Grantor Amendment with Finance is approved internally, using whichever approval workflow chosen by the agency, the amendment is sent to the subrecipient for them to review, make any changes, and accept or decline. (Required field)
- 9) Grantor Amendment Final Approval: Approval workflow for when approval is needed after a grantor-initiated amendment has been reviewed and accepted by the subrecipient. Once a Grantor Amendment is final approved, using whichever approval workflow chosen by the agency, the amended changes will appear in the subrecipients award. (Required field)
- 10) Return of Funds Approval: Approval workflow for when funds need to be returned to the subaward (i.e. overpayment to subrecipient). Please contact the GMO via the [User Support Form](#) if a Return of Funds is needed. (Required field)
- 11) Closeout Approval: Approval workflow that includes reviewing the final financial report and will officially closeout the subrecipient award and no further action can be taken by the subrecipient once approved. (Required field)

NOTE: This approval workflow requires additional certification language to comply with UGG 2 CFR 200. See [Appendix B](#) for how to enter required certification language.

- 12) Award Files: Award Files uploaded here will be automatically included in every Award Recommendation. An example would be the “How to Accept a Subaward in eCivis Portal” user guide or other common program documents that the subrecipient needs to complete the subaward acceptance process. Users will also be able to add subrecipient specific files when creating the subaward. (Optional field)

NOTE: Upload files for applicants in the Files tab. Upload files for subrecipients here in Award Files. Do not upload subaward agreement document here.

- 13) Task Notifications: Select “Weekly” for the subrecipient and their added team members to receive weekly reminders of upcoming and past due tasks (i.e., Activity Reports, Financial Reports, etc.). Leave as “None” for no notification emails to subrecipients. (Optional field)

Overview ✓
Eligibility ✓
Financial ✓
Contact ✓
Files ✓
Submission ✓
Goals ✓
Approval ✓

Step 8 of 8
★ = Required for Section Completion

Please define an approval workflow for each of the tasks below★

Task Type	Approver	Workflow
Recommendation Approval ⓘ	Laura Sullivan	Standard
Final Award Approval ⓘ	GMO - Test Group	Standard
Activity Report Approval ⓘ	Brittany Murtaugh	Standard
Financial Report Approval ⓘ	Payment Request Group	Standard
Amendment Approval ⓘ	Brittany Murtaugh	Standard
Amendment Approval with Finance ⓘ	Programmatic Team Group	Standard
Grantor Amendment Approval ⓘ	Programmatic Team Group	Standard
Grantor Amendment Approval With Finance ⓘ	Programmatic Team Group	Standard
Grantor Amendment Final Approval ⓘ	Programmatic Team Group	Standard
Return of Funds Approval ⓘ	Steve Thompson	Standard
Closeout Approval ⓘ	Grant Approval Group- Sequential	Sequential

Award Files may be optionally added. These would include common program documents that the subrecipient needs to complete the award process. The files included here will be included in the award task. You will also be able to add subrecipient specific files when creating the award.

Award Files

How to Accept an Award in...
962.2 Kb

Add File ➤

Task Notifications
Do you want to send reminder emails to subrecipients for upcoming and past due tasks? ⓘ

☐ None
☒ Weekly

☒ Financial Reports
☒ Activity Reports
☒ Miscellaneous Tasks
☒ CAP Tasks

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

Save ➤

Done ➤

2.11. Solicitation Review

Now that the solicitation is complete, review the information below to ensure all information is accounted for before moving forward to [Phase 3](#).

- 1) Ensure Budget Development and Detailed Financial Reports are correct (see section 2.8).
- 2) Funding Sources (see section 2.4. – Financial tab)
- 3) Solicitation posted 21 consecutive calendar days (see section 2.2. – Overview tab)
- 4) Required Certification Language (see section 2.10. – Approval Tab and [Appendix B](#))
- 5) For Non-Competitive/Direct-to-Award Programs only: Review [Appendix D](#) and ensure all guidance is followed.

Phase 3: Application and Review Manager Introduction

Once the solicitation is complete and all fields are checked and correct, the next steps take place in the Application and Review Manager (ARM). The Application & Review Management process will allow a Grantor to utilize the system for the following: Application Setup, Application Intake, and Reviewer Feedback and Evaluation before submitting an application for Award Recommendation in Grants Network.

3.1. ARM Overview

Application Process

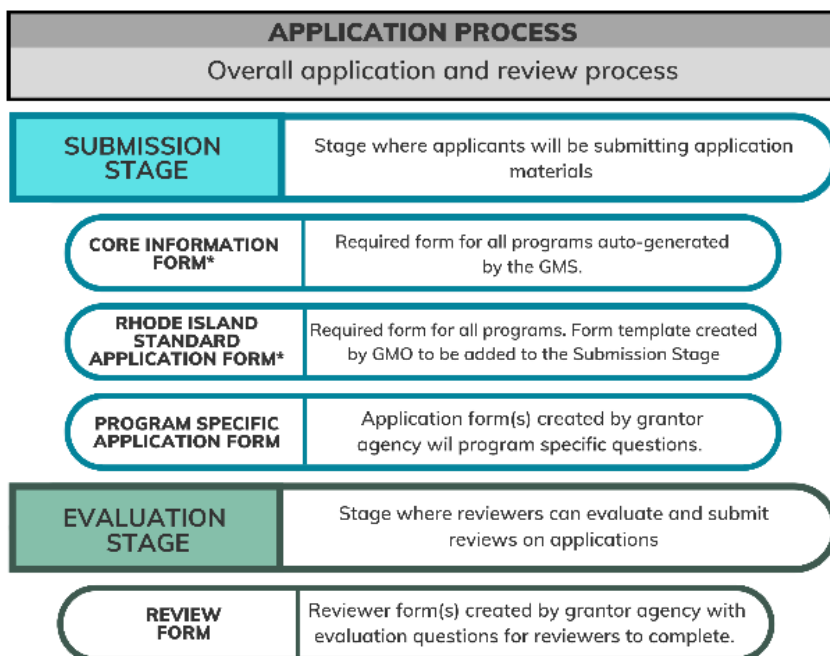
The Application and Review Manager allows agencies to build custom application and review experiences. The “Application Process” is the full experience from application set up, intake, and review. As part of this Application Process, agencies can create forms and templates for their programs. The images below show the breakdown of functionality when building a program and an example of how that looks once created.

Stage

There are two main stages in the Application Process, Submission and Review. These stages contain forms for the applicant or the reviewer to complete. Additional stages can be added to an Application Process (e.g. a Pre-Application Stage). However, typically there is one Submission Stage and one Review Stage.

Forms

Forms are the mechanism that grantor agencies can build part of the Application Process, whether that be for applicants, or for reviewers. A stage can have multiple forms nested beneath it. The forms added to the Submission Stage or Review Stage will depend on the program and will be where applicants and reviewers, respectively, provide the responses to the questions created by the grantor.



Templates

Templates allow for grantor agencies to create a Form, a Stage, or an entire Application Process to be saved and reused in the future. The use of templates is helpful for recurring programs. See [Appendix F](#) for more information on templates.

3.2. Navigating Through ARM

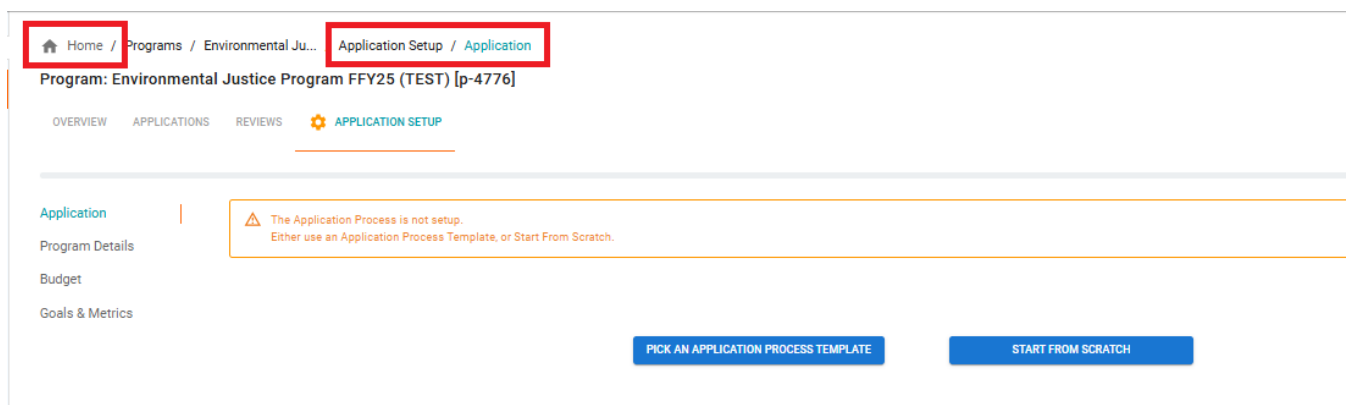
Accessing ARM

ARM is only accessible through a Solicitation. To open ARM, follow the instructions below.

- 1) Navigate to the Program Detail page of a solicitation and select *Application Management – Application and Review Manager*.



- 2) This will open the Application Setup section of the program selected. To get to the ARM Programs homepage, select the *Home* tab in the upper left-hand corner.



All Programs Page

The Programs Page will provide a list of all programs to which the user has access within the ARM System.

Program	Status	Start	End	App Setup	Department	Total Funding	Program Type
Economic Development FY2024 - ED01 [p-3676]	Draft	03/01/20...	01/01/20...	✓	Economic...	\$0.00	-
[p-4300]	Draft	04/01/20...	01/01/20...	⚠	Economic...	\$1,000,00...	-
[p-4299]	Published	04/01/20...	01/01/20...	✓	Economic...	\$1,000,00...	-
[p-4302]	Draft	04/01/20...	01/01/20...	⚠	Economic...	\$1,000,00...	-
[p-4306]	Finalized	04/01/20...	12/31/20...	✓	Economic...	\$1,000,00...	-
[p-4307]	Published	04/01/20...	01/01/20...	✓	Economic...	\$1,000,00...	-

1) Programs Page Key Icons





1. Program Icon: Selecting this icon will allow the user to land on the Programs Listings Page
2. Expand/Collapse Arrow: Expand the Left-Hand Navigation Bar
3. Programs Listings Page: this provides a dashboard of all Program Solicitations in the system
4. Breadcrumb Trail: lists the program path to current page
5. Export: user can export table data to .CSV or PDF File
6. Filter: allows the user to filter data listed on Program Page (e.g., column header)
7. Program: Name of subaward program

Program	Status	Start	End	App Setup	Department	Total Funding	Program Type
Economic Development FY2024 - ED01 [p-3676]	Draft	03/01/20...	01/01/20...	✓	Economic...	\$0.00	-
[p-4300]	Draft	04/01/20...	01/01/20...	⚠	Economic...	\$1,000,00...	-
[p-4299]	Published	04/01/20...	01/01/20...	✓	Economic...	\$1,000,00...	-
[p-4302]	Draft	04/01/20...	01/01/20...	⚠	Economic...	\$1,000,00...	-
[p-4306]	Finalized	04/01/20...	12/31/20...	✓	Economic...	\$1,000,00...	-
[p-4307]	Published	04/01/20...	01/01/20...	✓	Economic...	\$1,000,00...	-

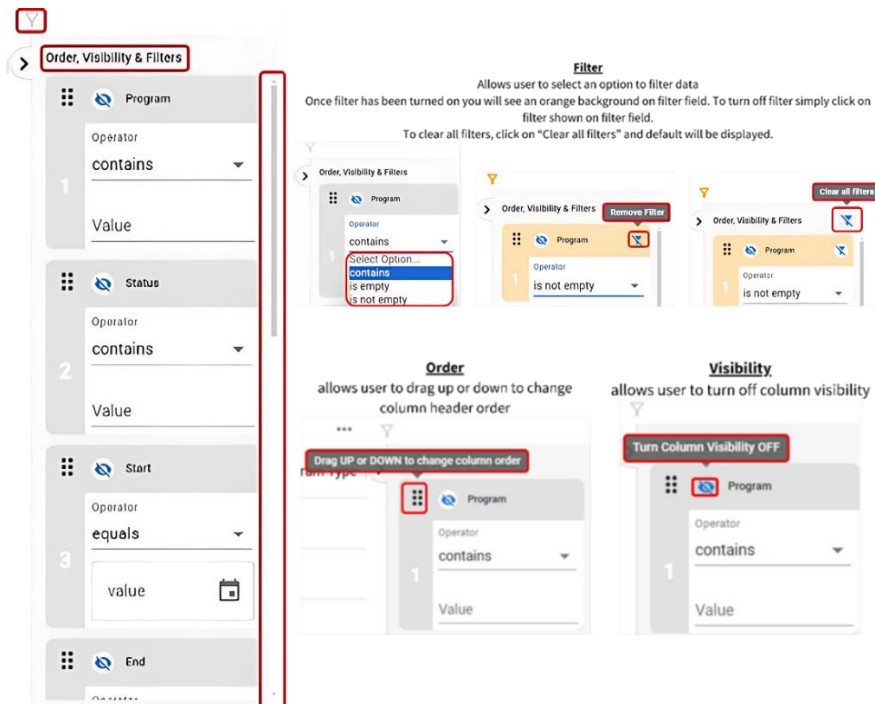
2) Column Header Descriptions

- Program: name and unique identifier for Program Solicitation.
- Status: status of the Program (e.g. Draft, Finalized, Published, Closed, Archived).
- Start: the start date of the Application Process set up for program. This date must be earlier than all other stage or form dates.
- End: the end date of the Application Process set up for this program. This date must be later than all other stage or form dates.
- App Setup: checkmark will display next to programs where the Application Process is set up with minimal requirements achieved. A warning symbol indicates that this has not been completed.
- Department: the department name in which this Program was created.
- Total Funding: total amount of funding allocated to this program.

- h. Program Type: indicates whether the Program is a Subprogram or tied to a Subprogram. (RI is not using Subprogram functionality.)

Program	Status	Start	End	App Setup	Department	Total Funding	Program Type
	Draft	-	-		Adminis...	\$0.00	-
	Draft	03/01/2...	01/01/2...		Economi...	\$0.00	-

- 3) **Filter Icons**: In the top right corner, users can utilize the Filter Icon for Order, Visibility, & Filters. A scroll bar is also available on the side of filters area so a user can scroll down to view additional column settings.



Program Page

Selecting a hyperlinked Program name from the All Programs list will open a Program Page. Use this page to view and manage the applications and reviews for a singular program.

Key Features of Program Page:

- 1) Program Name: lists the program name and includes auto-generated Program ID.
- 2) Bread Crumb Trail: shows the trail of links to arrive at the current page.
- 3) Navigation Tabs:
 - a. Overview Tab: Provides overview of program including the following

Draft Economic Development FY2024 - ED01

Department	Economic Development	Budget Template	SF-424A Non-Construction
Requested vs Available	<div style="display: flex; align-items: center;"> <div style="width: 100px; border-bottom: 1px solid #ccc; position: relative;"> <div style="background-color: #007bff; width: 100%; height: 10px; position: absolute; top: -10px; left: 0;"></div> </div> <div style="margin-left: 5px;">\$0.00</div> <div style="margin-left: 10px; border-left: 1px solid #ccc; height: 10px; position: relative;"> <div style="background-color: #007bff; width: 100%; height: 10px; position: absolute; top: -10px; left: 0;"></div> </div> <div style="margin-left: 5px;">\$1,000,000.00</div> </div>	Program Type	N/A
Application Period	<div style="display: flex; align-items: center;"> <div style="width: 100px; border-bottom: 1px solid #ccc; position: relative;"> <div style="background-color: #007bff; width: 100%; height: 10px; position: absolute; top: -10px; left: 0;"></div> </div> <div style="margin-left: 5px;">4/1/2024</div> <div style="margin-left: 10px; border-left: 1px solid #ccc; height: 10px; position: relative;"> <div style="background-color: #007bff; width: 100%; height: 10px; position: absolute; top: -10px; left: 0;"></div> </div> <div style="margin-left: 5px;">12/31/2024</div> </div>	Funded by 1 Projects	Small Business Development C... >
Solicitation Listing	https://gn.ecivis.com/GO/srpn... 	Access Reports	Grants Network Enterprise Reports

- Program Information and Status: General information and the status of the program.
- Applications Chart: This section provides a pictograph of the Applications submitted, how much time is remaining in the Application Process, and lists the statuses of Applications (e.g., Not Started, In Progress, On Hold, Recommend Award, Denied, Completed)

- Draft

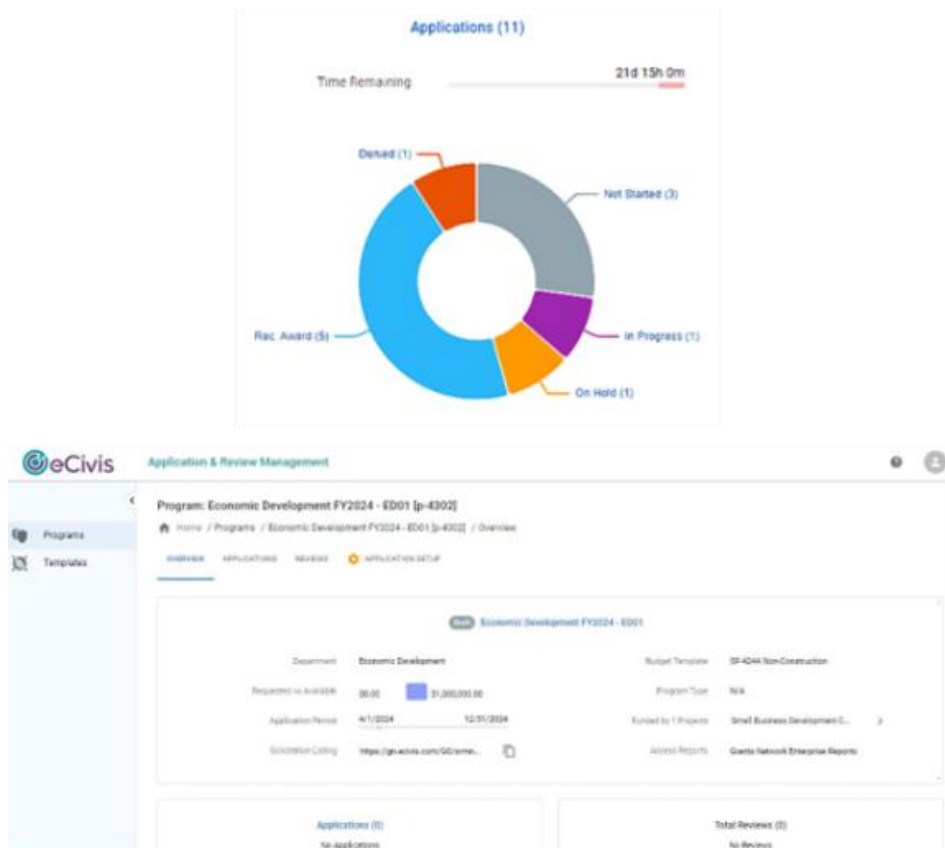
Indicates information can be edited
- Finalized

Indicates all information has been finalized and is ready to be published
- Published

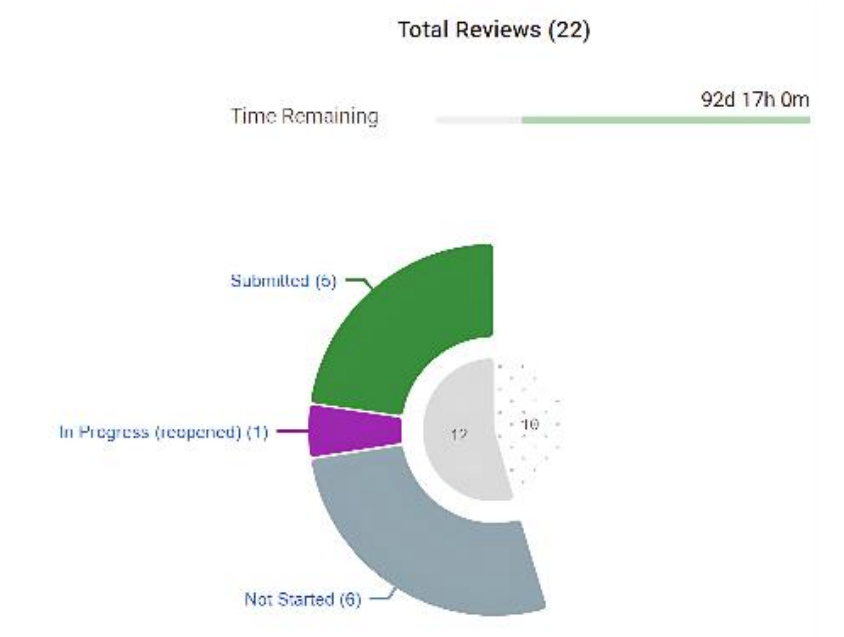
Indicates the application has been published
- Closed

Indicates the program has been closed by the Grantor
- Archived

Indicates this is inherited data from previous applicaiton management system (Zengine)



- **Total Reviews Chart:** This section provides a pictograph of the Total Reviews submitted, how much time is remaining in the Application Process, and lists the statuses of Applications (e.g., Not Assigned, Not Started, In Progress, Submitted).



- b. Applications Tab: Applications will populate here once applicants start the application process.

NOTE: The Overview, Applications, and Reviews tabs will not be visible until the program is published.

Application & Review Management

Program: Economic Development FY2024 - ED [p-3776]

Home / Programs / Economic Development FY2024 - ED [p-3776] / Applications

OVERVIEW APPLICATIONS REVIEWS APPLICATION SETUP

Project Title	Submitter	Application Status	Start Date	End Date	Budget	Actions
Business Incubator Impact Plan [api-000157]	Anthony Torres	Decision Denied			\$0.00	REVERT
[api-000160]	Anthony Torres	Not Started	11/01/2023	06/01/2024	\$0.00	
[api-000161]	Anthony Torres	Not Started	11/01/2023	06/01/2024	\$0.00	
Grants Station Area Economic Plan [api-000156]	Anthony Torres	Decision Rec: Award			\$0.00	
Community Economic Development Sup... [api-000159]	Anthony Torres	In Progress	11/01/2023	10/01/2024	\$0.00	
Economic Growth Initiative [api-000158]	Anthony Torres	Decision On Hold			\$0.00	REVERT RECOMMEND

- c. Reviews Tab: A list of designated Reviewers will be visible if Grantor has already added them to the Review tab of the Solicitation in Grants Network. If a Grantor has not completed [this step](#) and simply started creating the Application, no data will be found.

Application & Review Management

Program: Economic Development FY2024 - ED05 [p-4299]

Home / Programs / Economic Development FY2024 - ED05 [p-4299] / Reviews / Assign By Reviewer

OVERVIEW APPLICATIONS REVIEWS APPLICATION SETUP

Assign Reviewers to Applications

Name	Total Assigned	Not Started	In Progress	Submitted (since inception)
John Doe	10	10	10	10
Jane Doe	12	12	12	12

- d. Application Setup Tab: The Application Setup page will display the details of the Application Process. It is also where all editing and building of the Application Process will initiate.

Application & Review Management

Program: Economic Development FY2024 - ED05 [p-4299]

Home / Programs / Economic Development FY2024 - ED05 [p-4299] / Application Setup / Application

OVERVIEW APPLICATIONS REVIEWS APPLICATION SETUP

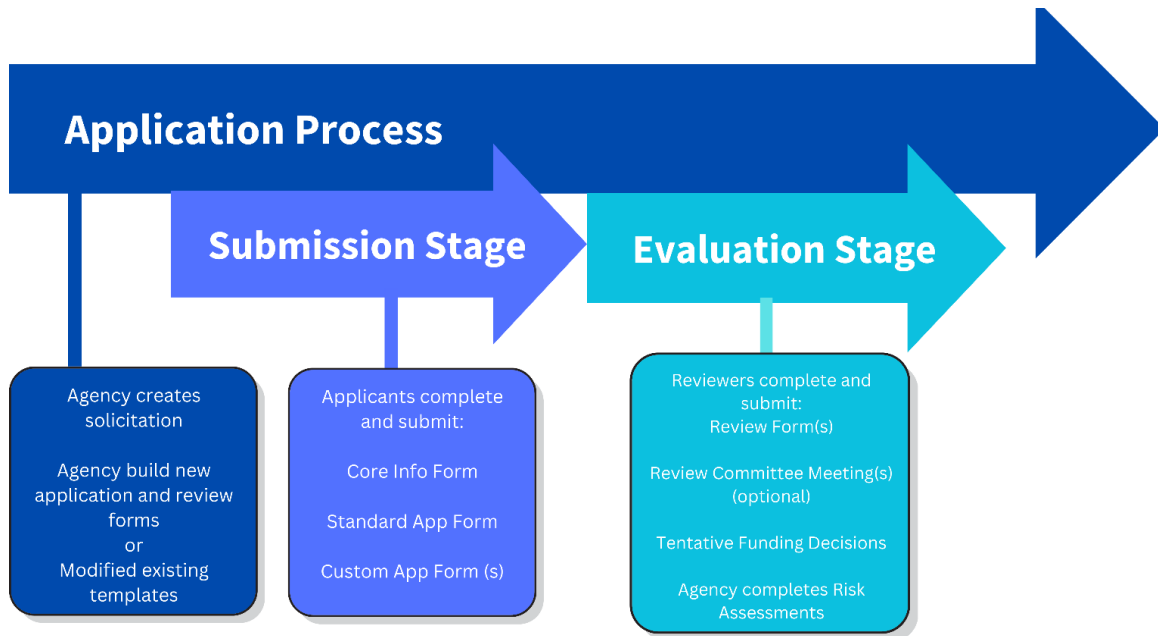
Application Last edited by: Anthony Torres, 04/23/2024 05:10PM

Entity	Type	BL	Instructions	Start	End	Usage & Actions
Economic Development F... [sym-000201]	APPLICATION PROCESS	--	①	04/01/2024	01/01/2025	ADD STAGE
1 Intent to Apply [sym-0001405]	Submission Stage	--	①	04/01/2024	08/01/2024	ADD FORM
2 Intent to Apply F... [sym-000738]	Application Form	--	①	--	--	ADD FORM
3 Eligibility Check [sym-000406]	Evaluation Stage	--	①	04/19/2024	08/01/2024	ADD FORM
4 Eligibility Review [sym-000739]	Review Form	--	①	--	--	ADD FORM
5 Project Submission [sym-000407]	Submission Stage	--	①	04/19/2024	08/01/2024	ADD FORM
6 Project Informa... [sym-000740]	Application Form	--	①	--	--	ADD FORM
7 Review Period [sym-000408]	Evaluation Stage	--	①	04/19/2024	01/01/2025	ADD FORM
8 Project Informa... [sym-000741]	Review Form	--	①	--	--	ADD FORM

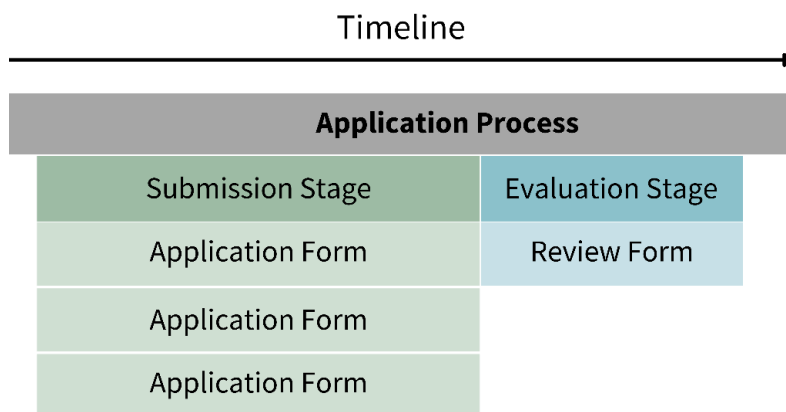
Phase 4: Building Application and Review Process

4.1. Application Process Build Overview

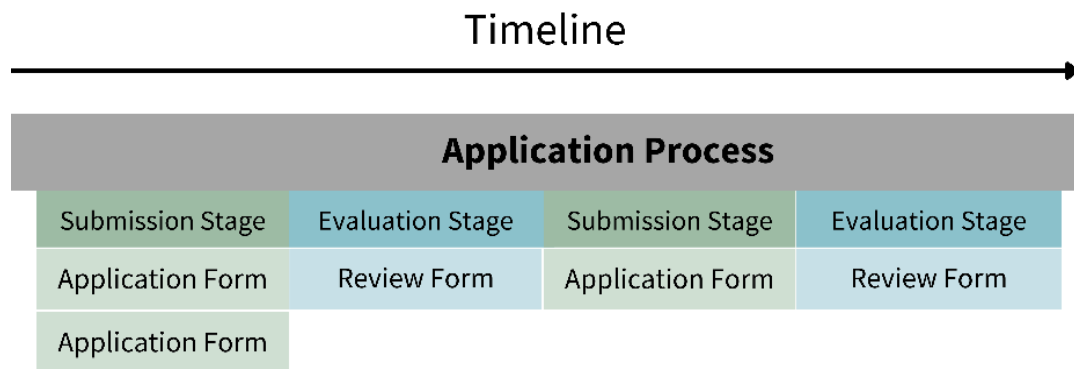
As explained in section 3.1., The Application Process encompasses the application build, submission stage, and review stage. Building the Application Process in ARM happens from the outside in, starting the Application Process, then Submission Stage(s), Application Form(s), Evaluation Stage(s), and Review Form(s). Below are examples of how the Application Process can be set up using the “From Scratch” option or Templates.



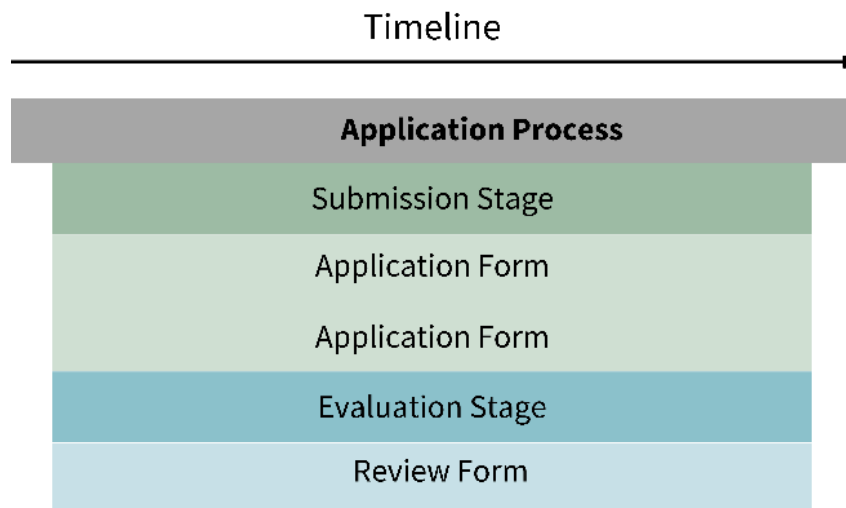
1. Standard Application Process: One Submission Stage with Three Application Forms followed by One Evaluation Stage with One Review Form.



2. Multi-Stage Application Process: First Submission Stage with two Pre-Application Forms followed by First Evaluation Stage with one Review Form followed by Second Submission Stage with one Application Form and ending with Second Evaluation Stage with one Review Form.



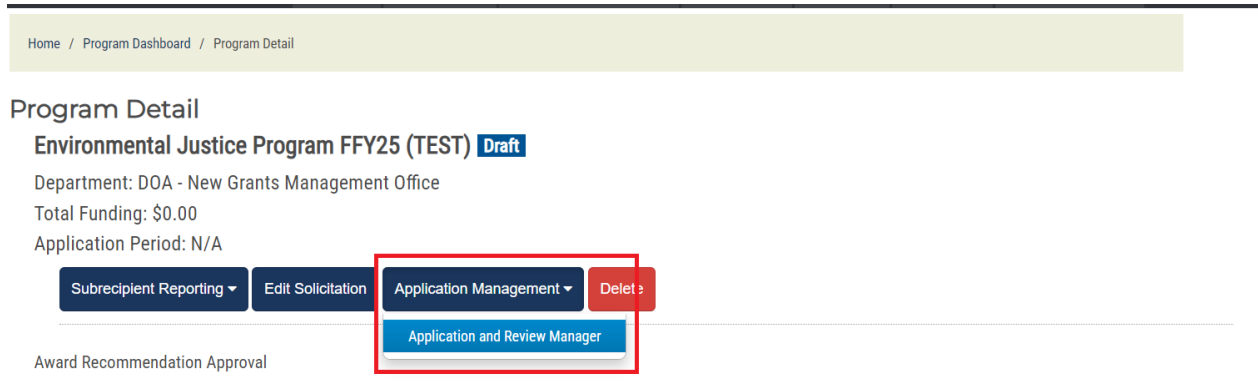
3. Rolling Application Process: One Submission Stage with two Application Forms occurring simultaneously with One Evaluation Stage and one Review Form.



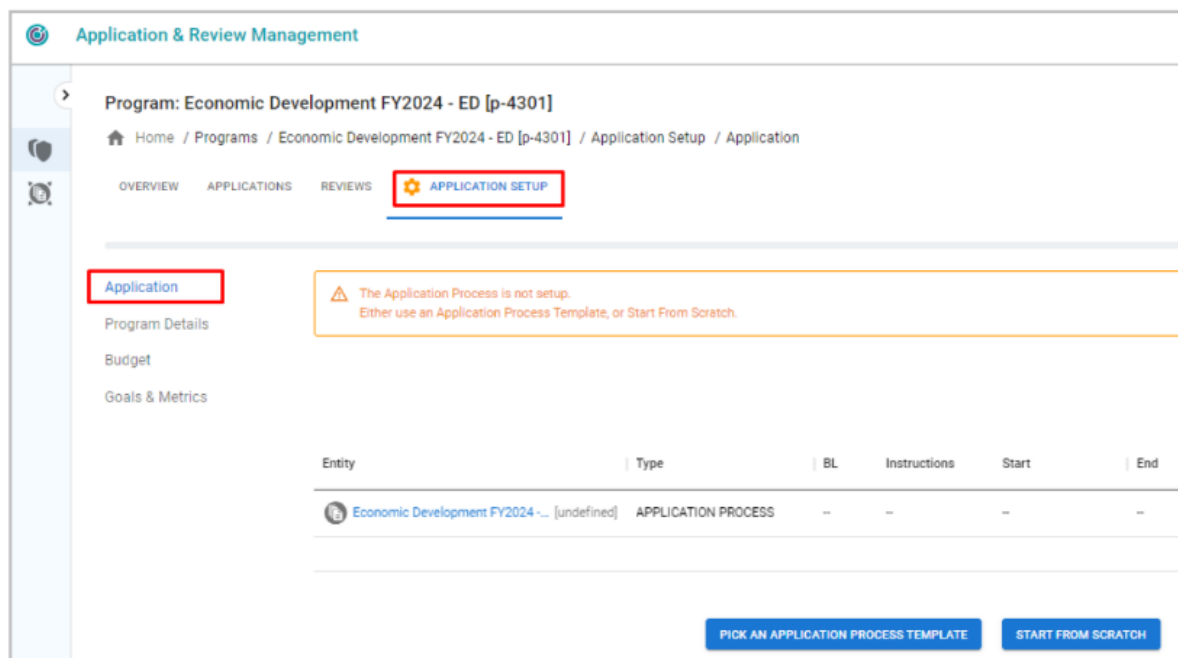
4. For all Application Processes:
 - a. At least one Submission Stage and Application Form must be created before an Evaluation Stage can be created.
 - b. All Stage and Form timelines must fall within Application Process timeline.
 - c. All Application Form timelines must fall within the Submission Stage timeline.
 - d. All Review Form timelines must fall within the Evaluation Stage timeline.
 - e. Submission Stages and Evaluation Stages can overlap.
 - f. Multiple Submission Stages and Evaluation Stages can exist.

4.2. Initiating Application Set Up

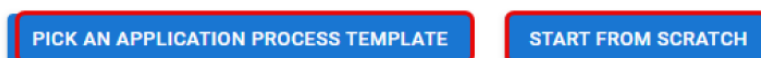
- 1) From the Program Dashboard select *Application Management – Application and Review Manager* to navigate back to ARM from Grants Network.



- 2) As the Application Setup page opens, begin building the stages and forms of the Application Process within the Application section on this page.



- 3) Begin creating the Application Process by selecting one of two options:
 - a. Pick an Application Process Template: Templates can be created for application forms, application stages, or full application process. See [Appendix F](#) for more information in templates.
 - b. Start from Scratch: This will create a blank Application Process to begin filling in the required elements.



NOTE: Templates need to be previously created following the instructions in [Appendix F](#).

4.3. Starting from Scratch

Application Process Information

If *Start from Scratch* was selected above, follow directions in this section.

- 1) Starting from scratch will require user to enter the information on the Application Process. The Application Process refers to the overall program foundation. Please see Enter the information below in the “Settings” section.

← Application Process for Program: Economic Development FY2024 - ED01

Last edited by: Anthony Torres, 04/25/2024 09:07AM / You (EunaState1-OMAH1) editing now. SAVE CANCEL

Settings

APPLICATION PROCESS META SETTINGS & INFO ^

Application Process Name *	Application Process ID
Application Process for Program: Economic Development FY2024 - ED01	apm-000201
Program Name	Program ID
Economic Development FY2024 - ED01	4302
Application Process Overall Instructions	
Applicants must first complete the Intent to Apply form and submit for an eligibility check. If eligible, applicants will then be able to submit project information for	
Start Date	End Date
04/01/2024 08:00 AM	12/31/2024 11:59 PM

- a. Application Process Overall Instructions: These will be the first instructions the applicant sees upon initiating an application. These instructions are not tied to a specific form in the application process and should provide general information about the application process.
 - b. Start Date: The Application Process start date refers to the start date of the entire process in ARM. The start date should begin on a date prior to the Submission Stage start date. Recommendation: The current date will auto-populate. Leave it unchanged.
 - c. End Date: The Application Process end date refers to the end date of the entire application process, not just when the application period closes for applicants. The Application Process end date should be after the anticipated date when all reviews for the applications will be completed.
NOTE: This date can be changed later but cannot be before any other stage or form end date.
- 2) Select *Save* once the information has been entered.
 - 3) To edit the Application Process information later, return to the Application Setup tab for the program and select the hyperlinked title of the program.

OVERVIEW APPLICATIONS REVIEWS **APPLICATION SETUP**

Application

Program Details

Budget

Goals & Metrics

The minimal setup is achieved.

- Add more stages and forms, and set the business logic as needed. When done, Finalize the settings to complete the process.
- The settings will be automatically locked after finalizing.
- In order to change a Finalized Application Process and its stages and forms used by the end user, you will need special permissions.

Therefore verify twice if everything is setup correctly before you Finalize the settings.

Last edited by: Brittany Murtaugh, 08/05/2024 10:48AM

FINALIZE

Entity	Type	BL	Instructions	Start	End	Usage & Actions
Non-Competitive (Direct to Award) Sub. [apm-000296]	APPLICATION PROCESS	--	①	08/05/2024	08/06/2028	ADD STAGE
Non-Competitive (Direct to Award) [apm-000566]	Submission Stage	--	①	08/05/2024	08/06/2028	ADD FORM
Core Information [apm-000967]	Application Form	--	①	--	--	
Waiver Review [apm-000585]	Evaluation Stage	--	①	08/27/2024	08/01/2028	ADD FORM
Waiver Review Form [apm-000967]	Review Form	--	①	--	--	

4.4. Add Submission Stage and Forms

Now that the Application Process has been created, Stages can be added to the process. See below for how to add a Submission Stage to the Application Process.

NOTE: Submission Stage(s) – the part applicants complete - need to be added before Evaluation Stage(s) – the part reviewers complete.

Add Submission Stage

- 1) Staying on the “Application Setup” tab, select the blue *Add Stage* button on the righthand side of the page to add a Stage.

eCivis Application & Review Management

Program: Economic Development FY2024 - ED02 [p-4300]

Home / Programs / Economic Development FY2024 - ED02 [p-4300] / Application Setup / Application

OVERVIEW APPLICATIONS REVIEWS **APPLICATION SETUP**

Application

Program Details

Budget

Goals & Metrics

The Application Process is not finalized.
Add at least a SUBMISSION STAGE (the mandatory Core Information Form will be automatically attached to your first Submission Stage).

Last edited by: Anthony Torres, 04/23/2024 10:31AM

FINALIZE

Submission stage was successfully deleted.

Entity	Type	BL	Instructions	Start	End	Usage & Actions
Economic Development FY2024 - ED02 [apm-000202]	APPLICATION PROCESS	--	①	04/01/2024	01/01/2025	ADD STAGE

- Submission Stage - From Scratch
- Submission Stage - Using Template
- Evaluation Stage - From Scratch
- Evaluation Stage - Using Template

- 2) There will be two options. Select “From Scratch” if a Stage Template has not been previously created. Select “Using Template” if a Stage Template was previously created.
 - a. If selected *From Scratch*, enter the following information. See [Appendix J](#) for recommendations on Stage names and instructions.

- **Stage Name:** Name of the Stage. This will be viewable to applicants when completing their application.
- **Instructions:** Only for this particular stage.
- **Start Date:** Start date & time for applicants to submit for this stage.
- **End Date:** End date & time for applicants to submit for this stage. It is recommended to set this time to 5:00pm or earlier so applicants have time to reach out to the agency or submit a user support form if they have last minute questions or issues.
- Once complete, select the blue Save button.

NOTE: If left unspecified, Start and End Dates will default to the date range of the Program's entire Application Process.

Submission Stage: Intent to Apply [ssm-000422] / unsaved

Last edited by: Anthony Torres, 05/10/2024 05:08PM / You (EunaState1-OMAH1) editing now.

Settings

APPLICATION PROCESS META SETTINGS & INFO

Stage Name: Intent to Apply

Stage ID: ssm-000422

Program ID: 4300

Please complete the Intent to Apply form for eligibility review. If eligible, you will then be able to submit project information for consideration by the program review committee

Start Date: 04/22/2024 12:00 AM

End Date: 07/31/2024 05:00 PM

#	Type	Name	Entity ID	BL	Instructions	Start	End	Usage & Actions
1	Application Form	Core Information	afm-000775	--	ⓘ	n/a	n/a	

NOTE: To add additional Submission Stages, repeat steps above.

- If selected *Use Template*, follow instructions below.
 - A new window will appear, and previously created Stage templates will be visible. Select the Stage template to add to the Application Process. Select *Apply Template*.

Submission Stage Templates

Pick a Template to be used for setting up your Submission Stage.

By applying the template the entire structure will be pre-populated. Once applied you can edit and customize the way you need it.

Submitter	Template ID	Template Title	Description	Published	Updated
<input checked="" type="radio"/> Anthony Torres	[set-000657]	Project Information Submission	This template is used in a sta...	10/09/2024	10/09/2024
<input type="radio"/> Anthony Torres	[set-000269]	Intent to Apply Submission	This template has a single fo...	01/17/2024	10/09/2024

1-2 of 2

APPLY TEMPLATE

NOTE: See [Appendix F](#) for template information.

NOTE: When creating a Submission Stage, a notice will appear that a “Core Information Form” will be automatically created and inserted into the submission stage as the first form. Take into consideration any overlap between the questions created in the template and the questions in the Core Information Form. Once statement is reviewed, select *Yes – Use Template* to move forward. See next section for more information on the Core Information Form.

- 3) To go back and edit information in a Submission Stage (such as application dates), select the hyperlinked Stage title under the “Application Set Up” tab.

Entity	Type	BL	Instruction
<div> Economic Development FY2024 - ED02 [apm-000345] </div>	APPLICATION PROCESS	--	
<div> Project Information Submission [asm-000661] </div>	Submission Stage	--	--
<div> Core Information [afm-001102] </div>	Application Form	--	

- 4) Now that a Stage has been created, form(s) can be added to this stage.

Core Information Form

Once the Submission Stage from the previous section has been created, the required application form titled “Core Information” will appear under the Submission Stage. This form contains the mandatory fields that will populate the award details when an applicant is selected for an Award. If using a Template, the standard “Core Information Form” will be inserted into the Submission Stage automatically as the first form. If there are multiple Submission Stages, it will appear on the first Submission Stage. See below on how to edit the Core Information Form.

- 1) Select the *Core Information* form hyperlink.

Application & Review Management

Program: Economic Development FY2024 - ED02 [p-4300]

Home / Programs / Economic Development FY2024 - ED02 [p-4300] / Application Setup / Application

OVERVIEW APPLICATIONS REVIEWS **APPLICATION SETUP**

Application

Program Details

Budget

Goals & Metrics

Stage Blocks need to be closed with an Evaluation Stage in order to Finalize the Application Process.

Last edited by: Anthony Torres, 04/23/2024 10:31AM

FINALIZE

Entity	Type	BL	Instructions	Start	End	Usage & Actions
<div> Economic Development FY2024 - ... [apm-000202] </div>	APPLICATION PROCESS	--		04/01/2024	01/01/2025	ADD STAGE
<div> Intent to Apply [asm-000422] </div>	Submission Stage	--		04/22/2024	07/31/2024	ADD FORM
<div> Core Information [afm-000775] </div>	Application Form	--		--	--	

- 2) Select the *Edit* button.

The screenshot displays the 'Application Form: Core Information [afm-000775]' interface. At the top, there is a navigation bar with a back arrow and the title. Below the title, there are tabs for 'SETUP FORM' and 'PREVIEW FORM'. A status bar indicates 'Last edited by: Anthony Torres, 05/11/2024 07:58AM'. The main area is divided into two sections: 'Form Layout' and 'Form Elements Toolbox'. The 'Form Layout' section contains 'FORM META SETTINGS & INFO' with fields for 'Form Name' (Core Information), 'Form ID' (afm-000775), 'Program Name' (Economic Development FY2024 - ED02), 'Submission Stage' (Intent to Apply), and 'Form Instructions' (Fill out Core Information). The 'Form Elements Toolbox' on the right has a red box around the 'EDIT' button and lists categories: LAYOUT, TYPOGRAPHY, CONTROLS, and UPLOAD/DOWNLOAD.

- 3) Add new fields or remove fields as needed. The “Project Title” and “Organization Name” cannot be deleted or edited. These will be the fields that transfer over to Grants Network to populate the subrecipient award if awarded. See [Appendix J](#) for recommendation on how to edit the Core Information Form to avoid duplicating responses.

NOTE: If all fields in a grouping are removed, the grouping start and end elements must also be removed. ([Appendix E](#), Form Elements Toolbox, Layout).

NOTE: See [Appendix E](#) for how to add/edit/manage fields in forms.

NOTE: Each individual application will require the applicant to fill out a new Core Information Form.

Add Required State of Rhode Island: Standard Application Form template

The State of Rhode Island requires that state agencies include a series of specific questions to all applicants. The “State of Rhode Island: Standard Application Form Questions” template has been created for agencies to easily add these questions to their Application Process. Follow the instructions below for how to add this template to a Submission Stage.

NOTE: No edits, deletions, or additions should be made to this template once added to the Submission Stage. To add program specific questions, follow directions in next section to add a custom application form.

- 1) In the Application section under “Application Set Up”, select *Add Form* for the Submission Stage.
- 2) There will be 2 options, select *Using Template*. A new window will pop up.
- 3) From the list of available templates, select the “State of Rhode Island: Standard Application Form Questions.”

NOTE: Agencies issuing subaward programs where **all** awards will be under \$10,000 may select the “State of Rhode Island: Streamlined Application Form Questions” instead.

Add Custom Application Form

Program specific application form(s) can be added to the Submission Stages to cover program specific questions for applicants. Follow directions below for how to add forms to a Stage. See [Appendix J](#) for recommendations on Form names and instructions.

- 1) In the Application section under “Application Set Up”, select *Add Form* for the Submission Stage.
- 2) There will be two options. Select *From Scratch* if a Form Template has not been previously created. Select *Using Template* if a Form Template was previously created.
 - a. If selected “From Scratch”, a new page will open to follow the Submission Form to be edited. See [Appendix E](#) for how to add and edit fields in a form.

- b. If selected “Using Template”, follow the instructions below.
 - A new window will appear, and previously created Form Templates will appear. Find the template to add to the Stage. Select *Apply Template*. The template will be added to the Submission Stage.

- 3) If edits to the form are needed, select the hyperlinked name of the form to access the edit options.

See [Appendix E](#) for how to add fields and edit forms.



- 4) Continue to add/edit Submission Forms under the Submission Stage until all information for the application is complete.

4.5. Add Evaluation Stage and Forms

Once a Submission Stage and Submission Form has been created, an Evaluation Stage and Review Form can be created. This will allow reviewers to access and evaluate submissions. See below for how to add an Evaluation Stage to the Application Process.

Add Evaluation Stage

- 1) On the “Application Setup” tab, select the blue *Add Stage* button on the righthand side of the page to add a Stage. (After adding an Evaluation Stage, there will be the option to add additional Submission Stage(s), if needed.)



- 3) There will be two options. Select “From Scratch” if a Stage Template has not been previously created. Select “Using Template” if a Stage Template was previously created. See [Appendix J](#) for recommendations on Stage names and instructions.

NOTE: See [Appendix F](#) for information on how to build templates.

a. If selected *From Scratch*, enter the following information.

- Stage Name: Name of the Stage. This will be viewable to applicants.
- Instructions: Only for this particular stage.
- Start Date: Start date & time for reviewers to submit for this stage.
- End Date: End date & time for reviewers to submit for this stage.

- Once complete, select the blue *Save* button.

NOTE: If left unspecified, Start and End Dates will default to the date range of the Program’s entire Application Process. If the preferred Evaluation Stage end date is greyed out, navigate to the Application Process and extend that end date. Then return to the Evaluation Stage and adjust the end date.

NOTE: To add additional Evaluation Stages, repeat steps above.

b. If selected *Use Template*, follow instructions below.

- A new window will appear, and previously created Stage templates will be visible. Select the Stage template to add to the Application Process. Select *Apply Template*.

5) To go back and edit information in an Evaluation Stage, select the hyperlinked Stage title under the “Application Set Up” tab.

6) Now that a Stage has been created, Review Form(s) can be added to this stage. See next section for additional details.

Set Content to Review

A Review Form allows the grantor to select which content from an application is visible to the reviewer. See instructions below for how to set specific content to be viewed and reviewed before creating a Review Form.

- 1) Navigate to the Evaluation Stage settings from previous section by selecting the hyperlink title of the Evaluation Stage that was just created.

Application & Review Management.

OVERVIEW APPLICATIONS REVIEWS **APPLICATION SETUP**

Application | Last edited by: Brittany Murtaugh, 12/24/2024 01:25PM

Program Details

Budget

Goals & Metrics

Entity	Type
Application Process for Program: State of Rhode... [apm-000458]	APPLICATION PROCESS
Application Forms [ssm-000910]	Submission Stage
Core Information [afm-001553]	Application Form
State of Rhode Island: Standard Applic... [afm-001554]	Application Form
Program Specific Information [afm-001555]	Application Form
Evaluation Stage [esm-000911]	Evaluation Stage
Review Form [rfm-001556]	Review Form

- 2) At the top of the page, select the *Set Content to Review* tab and select *Edit*.

← Evaluation Stage: Eligibility Check [] / **unsaved**

SETUP STAGE **SET CONTENT TO REVIEW**

/ You (EunaState1-OMAH1) editing now.

Settings

APPLICATION PROCESS META SETTINGS & INFO ^

← Evaluation Stage: Eval Stage [esm-000048]

SETUP STAGE **SET CONTENT TO REVIEW**

Last edited by: Anthony Torres, 12/06/2023 01:17PM **EDIT**

Application Forms to Review

Select what to review (only selected will be displayed in the Review)

☐ Core Information - (afm-000059)

Application [afm-000059]

☐ Project Title *

ORGANIZATION SUBMITTING APPLICATION

- 3) Select the checkbox next to any Application Form fields to include for reviewers during this Evaluation Stage.
- NOTE:** To select all fields within that Application Form, select the top checkbox beside the name of that form.

← Evaluation Stage: Evaluation Stage [esm-000911]

SETUP STAGE SET CONTENT TO REVIEW

Last edited by: Brittany Morlaugh, 12/24/2024 01:33PM / You (brittany.morlaugh@box.com) editing now.

Application Forms to Review

Select what to review (only selected will be displayed in the Review)

Core Information [afm-001553]

Application

Project Title

Organization Name

State of Rhode Island: Standard Application Form Questions [afm-001554]

APPLICANT INFORMATION

First Name

SAVE CANCEL

- 2) Once questions have been chosen, Save.

← Evaluation Stage: Eligibility Check [esm-000414]

SETUP STAGE SET CONTENT TO REVIEW

Last edited by: Anthony Torres, 05/02/2024 10:25PM / You (EunaState1-OMAH1) editing now.

Application Forms to Review

SAVE CANCEL

Add Review Form

Now that an Evaluation Stage has been created and the application content to be reviewed has been selected, a Review Form can be created. The Review Form will contain the questions/prompts the reviewer should respond to while evaluating applications. See below for how to add a Review Form to an Evaluation Stage. See [Appendix J](#) for recommendations on Form names and instructions.

- 1) In the Application section under the “Application Set Up” tab, select *Add Form* under the correct stage.

Entity	Type	BL	Instructions	Start	End	Usage & Actions
Application Process for Program: State of Rhode... [apm-000458]	APPLICATION PROCESS	--	①	12/24/2024	08/31/2025	
Application Forms [asm-000910]	Submission Stage	--	①	12/24/2024	08/28/2025	ADD FORM
Core Information [afm-001553]	Application Form	--	①	--	--	
State of Rhode Island: Standard Applic... [afm-001554]	Application Form	--	①	--	--	
Program Specific Information [afm-001555]	Application Form	--	①	--	--	
Evaluation Stage [esm-000911]	Evaluation Stage	--	①	04/01/2025	08/31/2025	ADD FORM
Review Form [rfm-001556]	Review Form	--	①	--	--	Review Form - From Scratch Review Form - Using Template

- 2) There will be two options, “From Scratch” and “Using Template”. The GMO has created two Review Form templates for agencies to use. The “Review Form (Ranked)” and the “Review Form (Non-Ranked)”. Select “Using Template” to see the template options.
 - 3) A new window will appear, and previously created Form Templates will be listed. Select one of the Review Form templates to add to the Evaluation Stage. Select *Apply Template*. See [Appendix G](#) for information about the review form template options pre-made for all agencies to utilize. Agencies can also select any previously made templates they have made at this point as well.
- NOTE:** Agencies can edit the Review Form template as needed AFTER the template has been added to the Evaluation Stage.

Submitter	Template ID	Template Title	Description	Published	Updated
<input type="radio"/> Anthony Torres	[bft-001092]	Project Information	This form is meant to captur...	10/09/2024	10/09/2024
<input checked="" type="radio"/> Anthony Torres	[bft-001094]	Project Information Form	This is the standard form for ...	10/09/2024	10/09/2024
<input type="radio"/> Anthony Torres	[bft-001095]	Project Information	This is a standard form	10/09/2024	10/09/2024

- 5) If edits to the Review Form are needed, select the hyperlinked name of the form to access the edit options. See [Appendix E](#) for how to add fields and edit forms.

▼ [camera icon] [Evaluation Stage](#) [esm-000911]

[document icon] [camera icon] [Review Form](#) [rfm-001556]

NOTE: Review Forms come with a calculated “Total Score” display at the bottom of the form. While building and editing fields, any scoring fields can be flagged (must be numbers) as a value to “Include in Total Score”.

FIRST NAME	LAST NAME	TITLE	Sustainability Plan Score
<input type="text"/>	<input type="text"/>	<input type="text"/>	7
Email	Phone	Phone Extension	Rate this field on a scale of 1-10 with 10 being the highest.
<input type="text"/>	<input type="text"/>	<input type="text"/>	Sustainability Plan Comments
BUSINESS/FINANCE REPRESENTATIVE(S)			The applicant provided strong evidence of their sustainability plan within their attached spreadsheet model
First Name	Last Name	Title	Total Score
<input type="text"/>	<input type="text"/>	<input type="text"/>	17 / (out of 20)

NOTE: If an agency chooses to not use one of the standard Review Templates select “From Scratch”, and a new page will open. The left-hand side will show the application questions sections selected to review and righthand side is where review questions for the reviewers to answer can be added/edited. It is required to include the state’s standard conflict of interest language and certification ([Appendix B](#)) in all review forms.

[SETUP FORM](#)
[PREVIEW FORM](#)

Application Forms to Review

Designated Grant Application

Profile

First Name *	Last Name *	Email Address *	Title
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Legal Name of Recipient E	Employer Identification Ni	UEI	DUNS Number
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Recipient Entity Name, Do	Website Address	City	State
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Form Layout

FORM META SETTINGS & INFO

Form Name *	Form ID
State Agency Review	rfm-000926
Program Name	Evaluation Stage
FY25 State of Rhode Island Designate	Review Stage
Form Instructions *	
GMO has provided a standard review form that you can use to help you review the	

NOTE: See [Appendix E](#) for how to add fields and edit forms.

Phase 5: Review Program and Publish

5.1. Review All Program Content

Before publishing, follow steps below to review and confirm all program information is accurate.

Review Solicitation Information

Navigate back to the solicitation in Grants Network and ensure the information below is accurate.

- 1) Budget Template
- 2) Contact Information
- 3) Files for applicant to review
- 4) Funding source(s)

Review Application Process Information

In ARM, ensure the Application Process, Stages, and Forms are accurate.

- 1) On the Program Page, navigate to the “Program Details” tab to review the set-up options selected while editing the solicitation in [Phase 2](#). Ensure the following information is correct:
 - a. Funding: Ensure funding source and total is accurate.
 - b. Application Period Start/End Date: Ensure it matches the Submission Stage start/end dates.
 - c. Check the correct Budget Template is appearing correctly.

Home / Programs / State of Rhode I... / Application Setup / [Program Details](#)

Program: State of Rhode Island Grant Program [p-5227]

OVERVIEW APPLICATIONS REVIEWS **APPLICATION SETUP**

Application

[Program Details](#)

Budget

Goals & Metrics

Program Name & Status

Published State of Rhode Island Grant Program [\[icon\]](#)

Requested Funds

A \$0.00

Available Funds

\$1.00

Application Period Start Date

B 12/24/2024 [\[icon\]](#)

Application Period End Date

08/31/2025

Solicitation Listing

https://gn.ecivis.com/GO/srmng_solicitationEdit/SOLICITATIONID/BE72C3AA-1216-4ABD-B37B-10AC24B55143 [\[icon\]](#)

Budget Template

C RI Non Construction - Subaward

Program Type

N/A

Funded by Project

A Training Source- DEMO

Reports

[Grants Network Enterprise Reports](#) [\[icon\]](#)

- 2) Select the *Goals and Metrics* tab and check that the Goals entered in the solicitation and listed here (if applicable).

Home / Programs / State of Rhode I... / Application Setup / [Goals & Metrics](#)

Program: State of Rhode Island Grant Program [p-5227]

OVERVIEW APPLICATIONS REVIEWS **APPLICATION SETUP**

Application

Program Details

Budget

Goals & Metrics

The purpose of program goals is to capture grant outcomes from your applicants that align to program priorities. Common goals in program attendance. Once awarded, applicants can submit progress reports against program goals.

Goal

Provide technical assistance to GMS users

- 3) Review all Stage and Form content.
 - a. Ensure Application Process and Stage start/end dates are correct.
 - b. Check that the “State of Rhode Island: Standard Application Form Questions” template is added to the Submission Stage.
 - c. Check content of all Forms for field accuracy and layout design.
- 4) The following items **cannot** be changed once *Ready to Publish* has been selected.
 - a. Stages cannot be added or removed
 - b. Forms cannot be removed
 - c. Optional form fields cannot be marked as required
 - d. Budget Template selected in the Solicitation (if applicable) cannot be edited
- 5) Items that can be changed once Ready to Publish has been selected include, but are not limited to.
 - a. Can add new forms
 - b. Can add/remove optional fields (but not required fields)
 - c. Can change/update Goals
 - d. Application Process, Stage, and Form start/end dates

5.2. Publish Program

- 1) Once the necessary components of the Application Process have been verified, select the *Ready to Publish* button on the Application Setup page to indicate that the Program is ready to publish.

OVERVIEW APPLICATIONS REVIEWS **APPLICATION SETUP**

Application | Program Details | Budget | Goals & Metrics

Application Setup

The minimal setup required to publish your solicitation has been achieved.

- Please continue to add more stages and forms, and set the business logic as needed. When done, click the Ready to Publish button in the settings to complete the process.
- After marking as Ready to Publish, you will be able to publish your solicitation in Grants Network.

Therefore verify twice if everything is setup correctly before you publish the settings.

Last edited by: Brittany Murtaugh, 08/05/2024 10:48AM

READY TO PUBLISH

Entity	Type	BL	Instructions	Start	End	Usage & Actions
--------	------	----	--------------	-------	-----	-----------------

- 2) Confirm the selection in the popup message.



Mark as Ready to Publish

Are you sure you want to continue? You will still be able to make changes to the solicitation after publishing, but you will no longer be able to mark fields as required.

READY TO PUBLISH

CANCEL

- 3) Navigate to the Grants Management Office webpage and submit a [User Support Form](#).
- 4) In the “Type of Issue” dropdown, select *Publish Solicitation*. Enter complete form and select *Submit*.
- 5) A member of the GMO team will contact the submitter via email in 1-3 business days to ask any follow up questions about the solicitation or ARM workspace, or email to confirm the program has been published.
- 6) Published, public solicitations will appear on the [State of RI Grant Funding Opportunities webpage](#).

NOTE: If the program is published before the Submission Stage begins, it will still appear on the website, but applicants will not see the *Apply* button linking them to the application until the start date set in ARM and in the solicitation “Overview” tab.

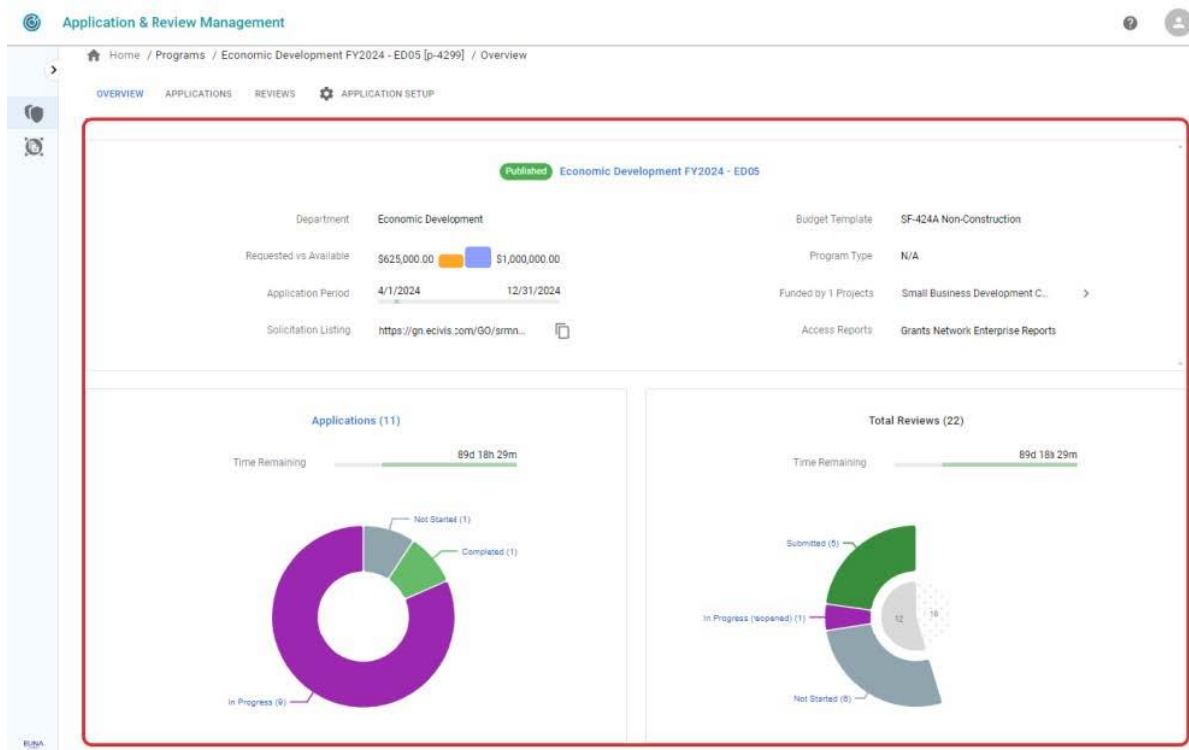
NOTE: For Non-Competitive (Direct-to-Awards): Complete steps 3-5 above and review all info in [Appendix D](#).

Phase 6: Managing and Monitoring the Application Process

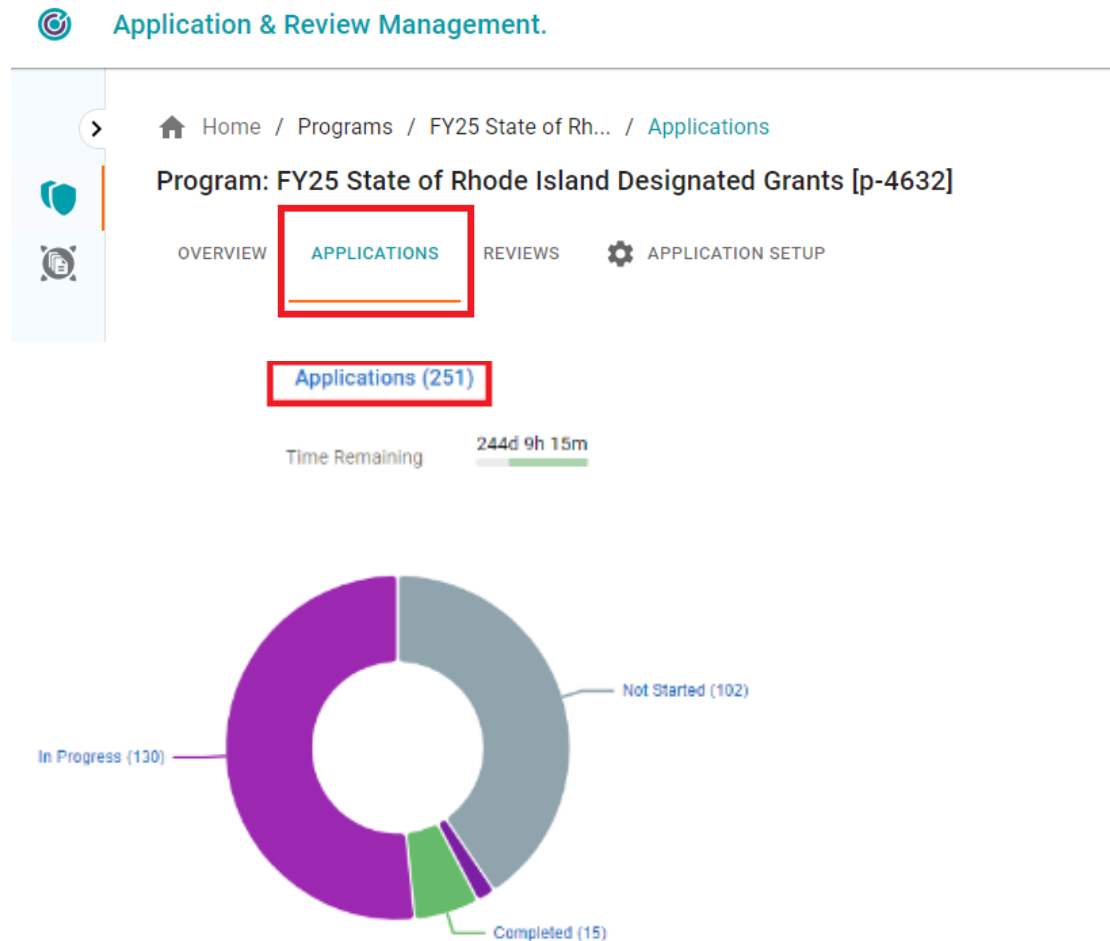
Once the Submission Stage has begun and applications are open, the grantor should monitor the application process in the Application and Review Manager (ARM).

6.1. Application Overview

- 1) From the ARM Dashboard (Overview tab), review the application information, such as time remaining and total applications submitted.



- 2) To view individual applications, navigate to the Applications tab on the Program Dashboard or select the Applications link on the pie chart.





6.2. Exporting Application Information

Exporting Application Data

- 1) To export data from the table of submitted Applications, select the Applications section of the program, and select the menu button (three dots) on the top-right corner of the table. Select one of the three export options.

am: Economic Development FY2024 - ED04 [p-4307]

VIEW **APPLICATIONS** REVIEWS  APPLICATION SETUP

Application Title	Submitter	Application Status	Start Date	End Date	Budget	Actions
ip-000235]	Anthony Tor...	Not Started	04/02/2024	08/01/2024	\$0.00	 <div>Generate List of Application Emails Export Table Data (.csv) Export Table to PDF</div>
ip-000163]	Anthony Tor...	In Progress	04/02/2024	08/01/2024	\$0.00	

- 2) Generate List of Application Emails: Use this option to copy all applicant emails to another location
- 3) Export Table Data (.csv): Exports the application data to a .csv file.
- 4) Export Table to PDF: Exports the application data to a PDF file.

Exporting a Completed Application Form

- 1) To export a PDF copy of a specific completed application form, open the Applications section and select a Project Title from the table.

Application & Review Management

Program: Economic Development FY2024 - ED05 [p-4299]

Home / Programs / Economic Development FY2024 - ED05 [p-4299] / Applications

OVERVIEW APPLICATIONS REVIEWS APPLICATION SETUP

Project Title	Submitter	Application Status	Start Date	End Date	Budget	Actions
[api-000170]	Anthony Torres	Not Started	04/01/2024	08/01/2024	\$0.00	
Regional Business Support Project - R02 [api-000164]	Anthony Torres	In Progress	04/01/2024	08/01/2024	\$0.00	
Grants Station Area Economic Plan [api-000171]	Anthony Torres	In Progress	04/19/2024	08/01/2024	\$0.00	
Community Business Support Project [api-000172]	Anthony Torres	In Progress	04/19/2024	08/01/2024	\$0.00	

- 2) Select the form name to view the completed form

Intent to Apply Form

Eligibility Check

Eligibility Review For

Project Submission

Project Information

Review Period

Project Information f

Project Team

Budget

Entity	Type	Completion	Status
Application [api-000165]	Application Instance	25%	In Progress
Intent to Apply [ssi-000333]	Submission Stage	100%	Submitted
Intent to Apply Form [afi-000416]	Application Form	6%	Completed
Eligibility Check [esi-000334]	Evaluation Stage	0%	Unassigned

- 3) Select *Export to PDF*

Instructions

Please complete all required fields below and any others that apply. Remember to request funds via the Budget section, entering your budgeted costs per category.

EXPORT TO PDF EDIT APPLICATION FORM COMPLETE

Application

In Progress [api-000766]

Project Title *

Jefferson Business Incubator

6.3. Re-Open an Application

- 1) If a Grantor needs to Re-Open an application, they will need to select the Application from the Applications Tab.

Application & Review Management

Program: Economic Development FY2024 - ED05 [p-4299]

Home / Programs / Economic Development FY2024 - ED05 [p-4299] / Applications

OVERVIEW APPLICATIONS REVIEWS APPLICATION SETUP

Project Title	Submitter	Application Status	Start Date	End Date	Budget	Actions
[api-000170]	Anthony Torres	Not Started	04/01/2024	08/01/2024	\$0.00	
Regional Business Support Project - R02 [api-000164]	Anthony Torres	In Progress	04/01/2024	08/01/2024	\$0.00	
Grants Station Area Economic Plan [api-000171]	Anthony Torres	In Progress	04/19/2024	08/01/2024	\$0.00	
Community Business Support Project [api-000172]	Anthony Torres	In Progress	04/19/2024	08/01/2024	\$0.00	

- 6) In the Actions column, choose to reopen one form or all forms in a particular Submission Stage.

The screenshot shows the 'Application & Review Management' interface. On the left is a sidebar with a navigation menu including 'Application [api-000165]', 'Intent to Apply', 'Intent to Apply Form', 'Eligibility Check', 'Eligibility Review For', 'Project Submission', 'Project Information', 'Review Period', and 'Project Information f'. The main area displays a table with columns: Entity, Type, Completion, Status, and Actions. The table lists several application forms, including 'Application [api-000165]' (Application Instance, 25% completion, In Progress status) and 'Intent to Apply [api-000333]' (Submission Stage, 100% completion, Submitted status). The 'Actions' column for the 'Submitted' status shows 'REOPEN ALL' and 'REOPEN' buttons, which are highlighted with a red box. Other buttons like 'ASSIGNMENTS' are also visible.

NOTE: The status of each re-opened form will update to “Draft (reopened)” and the Submission Stage will update to “In Progress (reopened)”. Applicants may then continue editing.

NOTE: Grantor agencies should not reopen applications after the submission window has ended without contacting the Grants Management Office for guidance.

Phase 7: Managing and Monitoring the Review Process

Per the [State Regulation](#), all competitive program applications must be reviewed. Programs that award any subrecipient \$30,000 or more must have at minimum 3 reviewers. Programs with awards under \$30,000 can choose the number of reviewers per application. Review the [State Regulation](#) for additional guidance on the review process. See instructions below for how to manage review process in ARM.

7.1. Assign Reviewers

- 1) Return to the solicitation in Grants Network and confirm the list of reviewers is correct. (See [Phase 2 Section 7](#))

Solicitation Edit

The screenshot shows the 'Solicitation Edit' interface with a navigation bar at the top containing tabs: Overview (with a red X), Eligibility (with a red X), Financial (with a red X), Contact (with a red X), Files (with a red X), and Review (with a green checkmark). Below the navigation bar, the 'Review' tab is active, displaying the text 'Please enter review committee members:'. A table titled 'Review Committee' lists two members: Jane Smith (jane.smith@doa.ri.gov) and John Doe (john.doe@doa.ri.gov). Each member has a red trash icon to their right. Below the table is an 'Add Reviewer' button with a right-pointing arrow. On the right side of the interface, there is a text box with the instruction: 'Review notes may be used that will help them in the solicitation. Once you have a representative will follow. These notes will not app'. Below this text box is a 'Source' button with a right-pointing arrow.

- 2) In ARM, return to the Program Page, “Applications” tab and choose how to assign reviewers.

- a. By Application Instance: while viewing a specific application and assigning one by one.
- b. Bulk Assign: by selecting the “Reviews” tab above and using the Bulk Assign feature.

Assign Reviewers by Application Instance

- 1) On the Evaluation Stage, select *Assignments* to assign reviewers.

The screenshot shows the 'Application [api-000165]' page. On the left is a sidebar with navigation items: Application [api-000165], Intent to Apply, Eligibility Check, Project Submission, Project Information, Review Period, and Project Information F. The main content area has a tab 'Instructions' and a table with columns: Entity, Type, Completion, Status, and Actions. The table lists several entities, including 'Application [api-000165]' (Application Instance, 25% completion, In Progress), 'Intent to Apply [ssi-000333]' (Submission Stage, 100% completion, Submitted), 'Intent to Apply Form [afi-000416]' (Application Form, 6% completion, Completed), 'Eligibility Check [esi-000334]' (Evaluation Stage, 0% completion, Unassigned), 'Eligibility Review Form [rfm-000739]' (Review Form(s), 0% completion, Unassigned), and 'Project Submission [csi-000335]' (Submission Stage, 0% completion, Not Started). The 'Assignments' button in the Actions column for the 'Eligibility Check' row is highlighted with a red box.

- 2) The Assignments of Evaluation Stage: Evaluation Process page will now open and will show who is assigned and who is listed on the Reviewers Pool.

The screenshot shows the 'Assignments of Evaluation Stage: Evaluation Process [esi-000105]' page. It has two main sections: 'Assigned' and 'Reviewers Pool'. The 'Assigned' section has a table with columns: Assigned Reviewer, Total Assigned, Not Started, In Progress, Submitted (since inception), and Actions. It shows 'No rows'. The 'Reviewers Pool' section has a table with columns: Name, Total Assigned, Not Started, In Progress, Submitted (since inception), and Actions. It lists two reviewers: Cynthia Salazar and Anthony Torres, both with 1 Total Assigned, 0 Not Started, 0 In Progress, and 1 Submitted (since inception). The 'Assign' button in the Actions column for each reviewer is highlighted with a red box.

- 3) Select *Assign* next to each Reviewer that must complete Review Forms for this application.

The screenshot shows the 'Reviewers Pool' page. It has a table with columns: Name, Total Assigned, Not Started, In Progress, Submitted (since inception), and Actions. It lists two reviewers: Cynthia Salazar and Anthony Torres, both with 1 Total Assigned, 0 Not Started, 0 In Progress, and 1 Submitted (since inception). The 'Assign' button in the Actions column for Cynthia Salazar is highlighted with a red box.

- 4) Select Yes to confirm.

The screenshot shows a confirmation dialog box titled 'Assign Reviewer'. It asks 'Are you sure?' and has two buttons: 'YES' (highlighted with a red box) and 'CANCEL'.

5) See below to confirm the Reviewer was added to the Assigned section of the table below.

← Assignments of Evaluation Stage: Evaluation Process [esi-000105]

Assigned					
Assigned Reviewer	Total Assigned	Not Started	In Progress	Submitted (since inception)	Actions
Cynthia Salazar	2	1	0	1	MANAGE ASSIGNMENTS

1-1 of 1

Reviewers Pool					
Name	Total Assigned	Not Started	In Progress	Submitted (since inception)	Actions
Anthony Torres	1	0	0	1	ASSIGN

6) It is possible to now Manage Assignments for each Assigned Reviewer by simply selecting the Actions Column under the Assigned section of the table. There are 3 options as listed below.

- Reassign & Keep Content: Move the assignments and review form content to another Reviewer account.
- Reassign & Delete Content: Move the assignment to another Reviewer account but delete the review form content.
- Unassign & Delete Content: Remove the assignment from this Reviewer and delete any review form content created by this Reviewer

Assignments of Evaluation Stage: Eligibility Check [esi-000330]

Assigned					
Assigned Reviewer	Total Assigned	Not Started	In Progress	Submitted (since inception)	Actions
John Doe	10	10	10	10	MANAGE ASSIGNMENTS

Reassign & Keep Content

 Reassign & Delete Content

 Unassign & Delete Content

Assign Reviewers by Bulk Assign

Bulk Assigning can be performed in one of three ways as described below.

- For All: Open the Reviews Tab and select an assignment method from the dropdown.

Application & Review Management

Program: Economic Development FY2024 - ED05 [p-4299]

Home / Programs / Economic Development FY2024 - ED05 [p-4299] / Reviews / Assign By Reviewer

OVERVIEW APPLICATIONS **REVIEWS** APPLICATION SETUP

Assign Reviewers to Applications

 Assign Reviewers to Applications

 Assign Applications to Reviewers

 Manage Assigned Reviews

	Total Assigned	Not Started	In Progress	Submitted (since inception)
<input type="checkbox"/> John Doe	10	10	10	10
<input type="checkbox"/> Jane Doe	12	12	12	12

BULK ASSIGN

2) Assign Reviewers to Applications

- Select the Reviewer name(s)
- Select *Bulk Assign*
- Select from a list of Applications (provided they have Evaluation stages ready for assignment)
- Select *Assign*

The screenshot shows the 'Application & Review Management' interface. The top navigation bar includes 'OVERVIEW', 'APPLICATIONS', 'REVIEWS', and 'APPLICATION SETUP'. The 'REVIEWS' tab is active, and the sub-tab 'Assign By Reviewer' is selected. A dropdown menu 'Assign Reviewers to Applications' is visible. A table lists reviewers with columns: Name, Total Assigned, Not Started, In Progress, and Submitted (since inception). John Doe and Jane Doe are listed. A 'BULK ASSIGN' button is highlighted. Below the table, a section 'Bulk assign the selected reviewers: John Doe, Jane Doe' is shown. A message states: 'If any of them are already assigned to any of the selected stages, they will remain in place. Select stages from below'. A table of applications is displayed with columns: Submitter, Application (Project Title), Evaluation Stage Name, Stage Status, Number of Reviewers, and Assigned Reviewers. Two rows are shown, both with 'Unassigned' status. A 'Assign to' dropdown is visible. A 'CANCEL' button and an 'ASSIGN' button are at the bottom. A sidebar on the right shows filters for 'Submitter', 'Application (Project Title)', and 'Evaluation Stage Name'.

Name	Total Assigned	Not Started	In Progress	Submitted (since inception)
John Doe	10	10	10	10
Jane Doe	12	12	12	12

Submitter	Application (Project Title)	Evaluation Stage Name	Stage Status	Number of Reviewers	Assigned Reviewers
✓	N/A	Review Period [esi-000328]	Unassigned	0	--
□	N/A	Review Period [esi-000495]	Unassigned	0	--

Assign Applications to Reviewers

- Select the Applications desired (provided they have Evaluation stages ready for assignment)
- Select *Bulk Assign*
- Select the Reviewer name(s)
- Select *Assign*

Users may take up to five minutes to appear in the list after they are added in Grants Network.

Assign Applications to Reviewers

BULK ASSIGN

Submitter	Application (Project Title)	Evaluation Stage Name	Stage Status	Number of Reviewers	Assigned Reviewers
<input checked="" type="checkbox"/>	N/A	Review Period [esi-0...	Unassigned	0	--
<input type="checkbox"/>	N/A	Review Period [esi-0...	Unassigned	0	--

Order, Visibility & Filters

Operator: contains

Value:

Application (Project Title)

Operator:

Bulk assign the selected evaluation stage(s): [esi-000328]

Assigned to

Assigned Reviewer	Total Assigned	Not Started	In Progress	Submitted (since inception)	Actions
John Doe	0	0	0	0	Assign

1-1 of 1

Reviewers Pool

Name	Total Assigned	Not Started	In Progress	Submitted (since inception)	Actions
John Doe	0	0	0	0	Assign
Jane Doe	0	0	0	0	Assign

5) View all assignments made and reassign or unassign using the “Bulk Manage Assignments” button.

Application & Review Management

Program: Economic Development FY2024 - ED05 [p-4299]

Home / Programs / Economic Development FY2024 - ED05 [p-4299] / Reviews / Manage Assigned

OVERVIEW APPLICATIONS **REVIEWS** APPLICATION SETUP

Manage Assigned Reviews

BULK MANAGE ASSIGNMENTS

Reassign & Keep Content

Reassign & Delete Content

Unassign & Delete Content

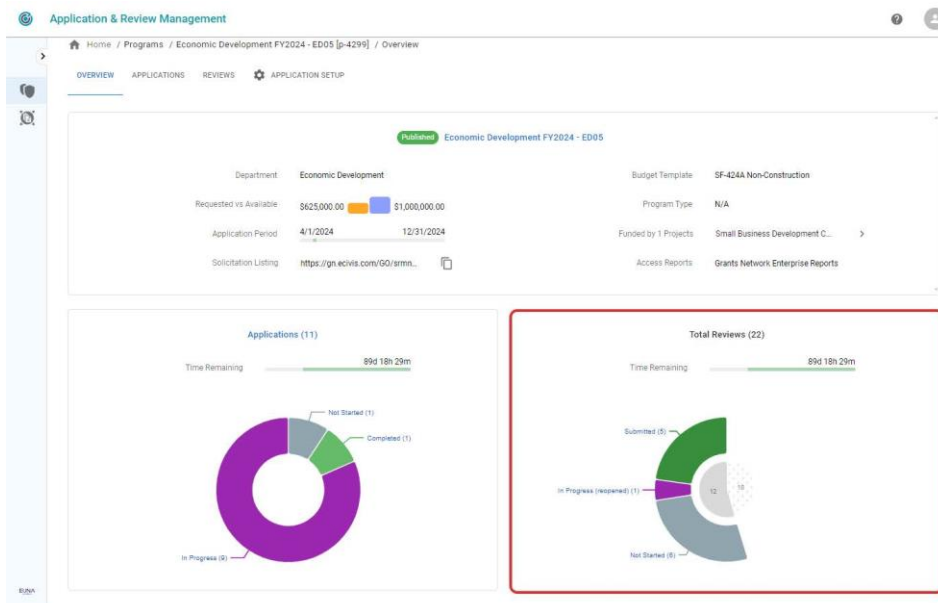
Reviewer	Project Title	Application ID	Submitter	Stage Name	Stage ID	Stage Status	Form ID
John Doe		api-000166	Anthony Torres	Eligibility Check	esi-000338	Submitted	
							rfm-000739 Eligibility Review... rfi-000420
		api-000167	Anthony Torres	Eligibility Check	esi-000342	Submitted	
							rfm-000739 Eligibility Review... rfi-000424

7.2. Monitoring Reviews

There are multiple locations where grantors can monitor the review progress.

Check Status of Reviews

- 1) On the Overview tab for the program, use the Total Reviews chart to track the statuses and time remaining for all Reviews.



- 2) Select the *Applications* tab up above to open a specific Application and monitor the status of the Reviews.

Program: Economic Development FY2024 - ED05 [p-4299]

Home / Programs / Economic Development FY2024 - ED05 [p-4299] / Applications

OVERVIEW **APPLICATIONS** REVIEWS APPLICATION SETUP

Project Title ↑	Submitter	Application Status	Start Date	End Date
Business Incubator Impact Plan [api-000173]	Anthony Torres	In Progress	04/19/2024	08/01/2024
Community Business Support Project [api-000172]	Anthony Torres	In Progress	04/19/2024	08/01/2024
Economic Growth Initiative [api-000174]	Anthony Torres	In Progress	04/19/2024	08/01/2024
Grants Station Area Economic Plan [api-000171]	Anthony Torres	In Progress	04/19/2024	08/01/2024
Regional Business Support Project - R02 [api-000164]	Anthony Torres	In Progress	04/01/2024	08/01/2024

- 3) Select the Review Form in question using the navigation bar on the left. Next there is the “Details & Statuses” page with a breakdown of the status on all assigned Reviewers for this Application.

Program: Economic Development FY2024 - ED05 [p-4299]

Home / Programs / Economic Development FY2024 - ED05 [p-4299] / Applications / [api-000166] / Eligibility Check [esi-000338] / Eligibility Review Form [rfm-000739] / Details

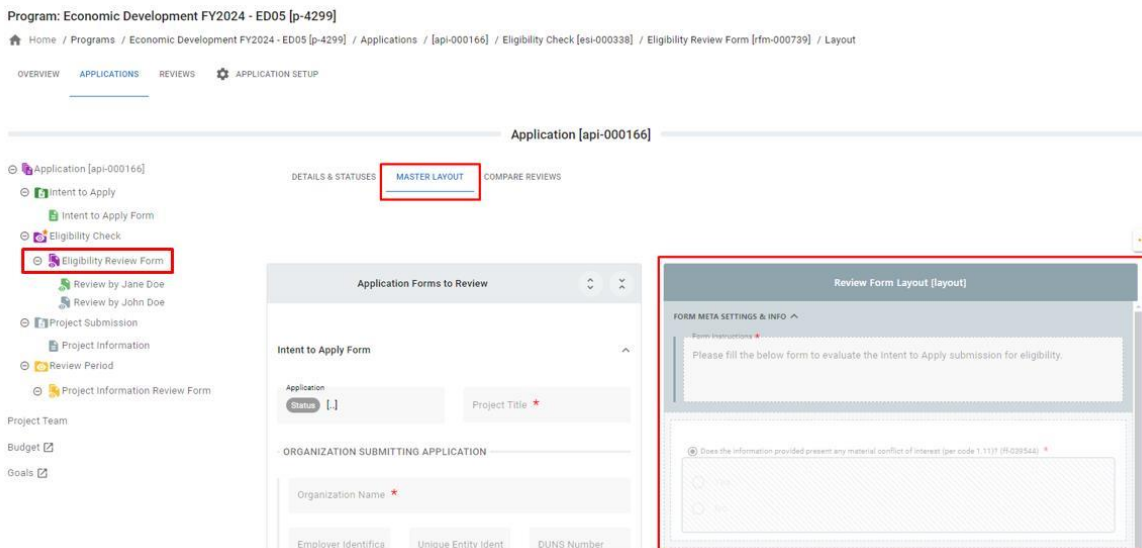
OVERVIEW APPLICATIONS REVIEWS APPLICATION SETUP

Application [api-000166]

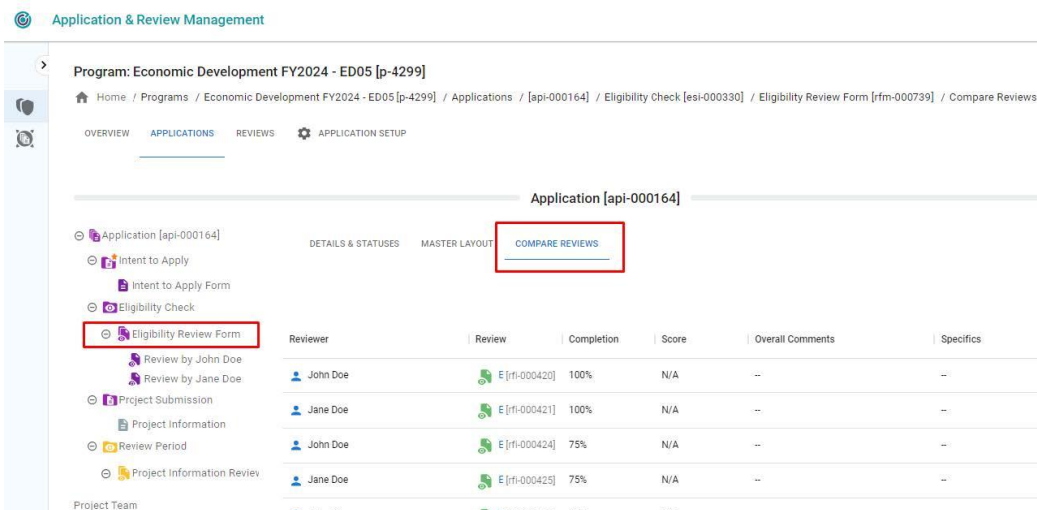
DETAILS & STATUSES MASTER LAYOUT COMPARE REVIEWS

Entity	Type	Completion	Status	Actions
<ul style="list-style-type: none"> Application [api-000166] <ul style="list-style-type: none"> Intent to Apply <ul style="list-style-type: none"> Intent to Apply Form Eligibility Check <ul style="list-style-type: none"> Eligibility Review Form <ul style="list-style-type: none"> Review by Jane Doe Review by John Doe Project Submission <ul style="list-style-type: none"> Project Information Review Period Project Information Review Form 	Eligibility Review Form [rfm-000739]	50%	In Progress	
	Review by Jane Doe [rfi-000421]	100%	Completed	REOPEN
	Review by John Doe [rfi-000497]	0%	Not Started	EDIT

4) Select the *Master Layout* heading to view the form's design.

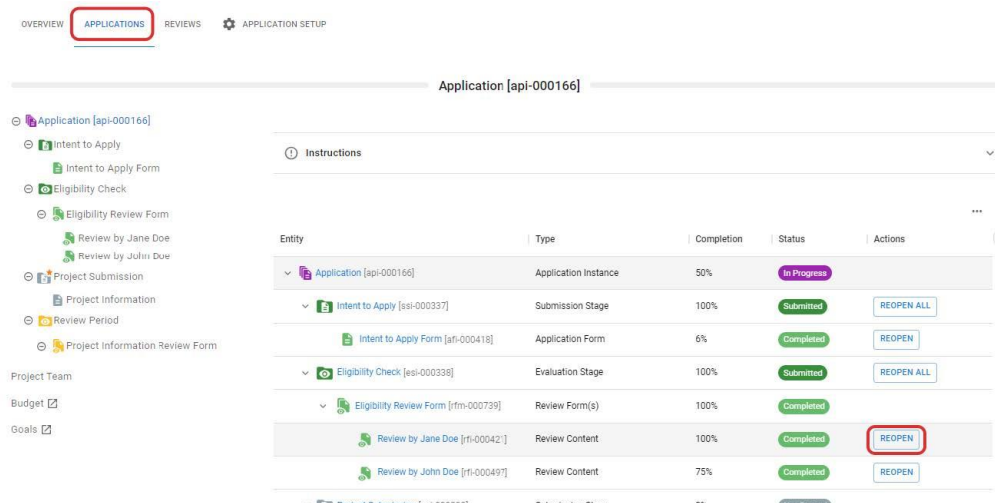


5) Select the *Compare Reviews* heading to view the status & details of reviews across all submitted applications within this Evaluation Stage.



Reopen a Review

- a. On the Applications tab, locate the Review marked Complete and select *Re-Open*.



- b. The status will update to “Draft (Reopened)” and the reviewer will be able to make further edits and then *Complete*.

Application [api-000166]

Instructions

Entity	Type	Completion	Status	Actions
Application [api-000166]	Application Instance	25%	In Progress	
Intent to Apply [ssi-000337]	Submission Stage	100%	Submitted	REOPEN ALL
Intent to Apply Form [afi-000418]	Application Form	6%	Completed	REOPEN
Eligibility Check [esi-000338]	Evaluation Stage	50%	In Progress (reopened)	ASSIGNMENTS REOPEN ALL
Eligibility Review Form [rfm-000739]	Review Form(s)	50%	In Progress (reopened)	
Review by Jane Doe [rfi-000421]	Review Content	100%	Draft (reopened)	EDIT COMPLETE
Review by John Doe [rfi-000497]	Review Content	75%	Completed	REOPEN

Phase 8: Completing a Review

The sections below will discuss how a Reviewer will access and complete their Review Forms. The access point depends on whether the Reviewer is external to the Program team or part of the Program team (having access to the ARM dashboards).

8.1. Completing Review Form in ARM (State Agency Users)

As a Reviewer, if working in the organization and have access to Grants Network, use of the Reviewer Portal in Portal is not needed.

- 1) Access the Application and Review Manager and appropriate Program by following instructions in [Phase 3 Section 2](#).
- 2) In the Applications tab, select *Edit* next to the Review Form assigned.

OVERVIEW APPLICATIONS REVIEWS APPLICATION SETUP

Application [api-000166]

Instructions

Entity	Type	Completion	Status	Actions
Application [api-000166]	Application Instance	25%	In Progress	
Intent to Apply [ssi-000337]	Submission Stage	100%	Submitted	REOPEN ALL
Intent to Apply Form [afi-000418]	Application Form	6%	Completed	REOPEN
Eligibility Check [esi-000338]	Evaluation Stage	50%	In Progress	ASSIGNMENTS REOPEN ALL
Eligibility Review Form [rfm-000739]	Review Form(s)	50%	In Progress	
Review by Jane Doe [rfi-000421]	Review Content	100%	Completed	REOPEN
Review by John Doe [rfi-000497]	Review Content	0%	Not Started	EDIT

- 3) Viewing the “Application Forms to Review” on the left-hand side of the screen, Reviewers will provide feedback using the fields on the right.

Application Forms to Review

Intent to Apply Form

Application Status [..]

Project Title *
Regional Business Support Project - R03

ORGANIZATION SUBMITTING APPLICATION

Organization Name *
City of EUNA

Employer Ident Unique Entity Id DUNS Number

ORGANIZATION ADDRESS

Street Address Apt, Suite, etc.

0% completed

Does the information provided present any material conflict of interest (per code 1.11)? *

☐ Yes ☒ No

Project Narrative Score *
9

Rate this field on a scale of 1-10 with 10 being the highest.

Project Narrative Comments
The application effectively explained the project and this seems to be a great fit!

Does the project serve within the approved geographical area?

☒ Yes ☐ No

NOTE: If the Review Form is built with scoring fields that add up to a total score, there will be a “Total Score” value at the bottom of the form. Some Review Forms may not have a Total Score.

AUTHORIZED REPRESENTATIVE(S)

First Name Last Name Title

Email Phone Phone Extension

BUSINESS/FINANCE REPRESENTATIVE(S)

First Name Last Name Title

Email Phone Phone Extension

Sustainability Plan Score
7

Rate this field on a scale of 1-10 with 10 being the highest.

Sustainability Plan Comments
The applicant provided strong evidence of their sustainability plan within their attached spreadsheet model

Total Score 17 / (out of 20)

- 5) To export a copy of the filled Review Form to PDF format, select *Export to PDF* from the top-right corner of the page.

Please fill the below form to evaluate this submission for award consideration.

Application Forms to Review

Core Information

EXPORT TO PDF

100% completed

Does the information provided present any material conflict

6) Once all required fields of the Review Form are complete, select *Save*.

The screenshot shows the 'Application [api-000165]' review form. On the left, a sidebar lists 'Application [api-000165]', 'Eligibility Check', 'Eligibility Review Form', and 'Review by Jane D.'. Below this are 'Project Team', 'Budget' (checked), and 'Goals' (checked). The main form is titled 'Application Forms to Review' and contains two sections: 'Intent to Apply Form' and 'ORGANIZATION SUBMITTING APPLICATION'. The 'Intent to Apply Form' section includes 'Application' (Status: [.]), 'Project Title' (Regional Business Support Project - R03), and 'Project Narrative Score' (9). The 'ORGANIZATION SUBMITTING APPLICATION' section includes 'Organization Name' and 'City of EUNA'. On the right, a '0% completed' progress bar is shown. Below it, a question asks 'Does the information provided present any material conflict of interest (per code 1.11)?' with 'Yes' and 'No' radio buttons. The 'No' button is selected. Below this is a 'Project Narrative Score' field with the value '9' and a note 'Rate this field on a scale of 1-10 with 10 being the highest.' Below that is a 'Project Narrative Comments' field with the text 'The application effectively explained the project and this seems'. At the top right, there are 'SAVE' and 'CANCEL' buttons, with 'SAVE' highlighted by a red box.

7) If no further edits are needed and the Review Form is ready to submit, select *Complete* to submit the review.

The screenshot shows the same 'Application [api-000165]' review form as before, but now the '100% completed' progress bar is shown. The 'Project Narrative Score' field now shows '9' with '(1-10)' next to it. The 'Project Narrative Comments' field still shows 'The application effectively explained the project and this seems'. At the top right, there are 'EDIT REVIEW' and 'COMPLETE' buttons, with 'COMPLETE' highlighted by a red box.

8) If further edits are needed after completing the review, select the *Reopen* button.

The screenshot shows a close-up of the 'EDIT REVIEW' and 'REOPEN' buttons. The 'REOPEN' button is highlighted by a red box.

8.2. Completing Review Form in eCivis Portal (Non-State Agency Users)

Reviewers who do not have eCivis Portal accounts (Non-State Agency) should follow the instructions below to complete a review. These reviewers will also need an eCivis Portal account. If the reviewer does not have an eCivis Portal account, see the [eCivis Portal – Access and Login guide](#) (pages 1-2) to create an account.

1) Once logged in to eCivis Portal (<https://portal.ecivis.com>), locate the My Reviews selection from the left-hand navigation bar.

My Reviews

Project Title	App Status	Organization (S...)	Nr of Forms	Present Stage	Stage Status
Small Business Regional Support F... [api-000003]	In Progress	City of Euna	1	Evaluation Process	Not Started
Small Business Regional Support [api-000006]	Rec. Award	City of Euna II	2	...	
Community Project ABC [api-000049]	In Progress	County of EUNA	1		
Community Project ABC [api-000050]	Denied	Euna County	1	...	
Building Better Communities [api-000051]	Pending Deci...	City of Euna	1	...	

- 2) Select the appropriate “Application ID” to review. The stage status will show “Not Started” if review has not previously need started.

My Reviews

Project Title	App Status	Organization (...)	Nr of Forms	Present Stage	Stage Status	Started
Regional Business Support Project... [api-000165]	In Progress	City of EUNA	2	Eligibility Che...	Not Started	04/19/2024
Regional Business Support Project... [api-000166]	In Progress	City of EUNA	2	Eligibility Che...	In Progress	04/10/2024

- 3) Select *Edit* next to the appropriate Review Form.

Application [api-000165]

Entity	Type	Completion	Status	Actions
Application [api-000165]	Application Instance			
Eligibility Check [esi-000334]	Evaluation Stage			
Eligibility Review Form [rfm-000739]	Review Form(s)			
Review by Jane Doe [rfi-000495]	Review Content	0%	Not Started	EDIT

- 4) Viewing the “Application Forms to Review” on the left-hand side of the screen, Reviewers will provide feedback using the fields on the right.

Eligibility Review Form

Review by Jane D.

Project Team

Budget

Goals

Application Forms to Review

Intent to Apply Form

Application Status

Project Title

Regional Business Support Project - R03

ORGANIZATION SUBMITTING APPLICATION

Organization Name

City of EUNA

Employer Identification Number

Unique Entity ID

DUNS Number

ORGANIZATION ADDRESS

Street Address

Apt, Suite, etc.

0% completed

Does the information provided present any material conflict of interest (per code 1.11)? *

☐ Yes

☒ No

Project Narrative Score *

9

Rate this field on a scale of 1-10 with 10 being the highest.

Project Narrative Comments

The application effectively explained the project and this seems to be a great fit!

Does the project serve within the approved geographical area?

☒ Yes

☐ No

NOTE: If the Review Form is built with scoring fields that add up to a total score, there will be a “Total Score” value at the bottom of the form. Some Review Forms may not have a Total Score.

AUTHORIZED REPRESENTATIVE(S)

First Name

Last Name

Title

Email

Phone

Phone Extension

BUSINESS/FINANCE REPRESENTATIVE(S)

First Name

Last Name

Title

Email

Phone

Phone Extension

Sustainability Plan Score

7

Rate this field on a scale of 1-10 with 10 being the highest.

Sustainability Plan Comments

The applicant provided strong evidence of their sustainability plan within their attached spreadsheet model.

Total Score

17 / (out of 20)

- 7) To export a copy of the filled Review Form to PDF format, select *Export to PDF* from the top-right corner of the page.

Please fill the below form to evaluate this submission for award consideration.

Application Forms to Review

Core Information

100% completed

Does the information provided present any material conflict

EXPORT TO PDF

8) Once all required fields of the Review Form are complete, select *Save*.

Application [api-000165]

Application [api-000165]

Eligibility Check

Eligibility Review Form

Review by Jane D.

Project Team

Budget

Goals

Application Forms to Review

0% completed

Does the information provided present any material conflict of interest (per code 1.11)? *

☐ Yes

☒ No

Project Narrative Score *

9

Rate this field on a scale of 1-10 with 10 being the highest.

Project Narrative Comments

The application effectively explained the project and this seems

Intent to Apply Form

Application

Status

Project Title *

Regional Business Support Project - R03

ORGANIZATION SUBMITTING APPLICATION

Organization Name *

City of EUNA

SAVE CANCEL

7) If no further edits are needed and the Review Form is ready to submit, select *Complete* to submit the review.

Application [api-000165]

Application [api-000165]

Eligibility Check

Eligibility Review Form

Review by Jane D.

Project Team

Budget

Goals

Application Forms to Review

100% completed

Does the information provided present any material conflict of interest (per code 1.11)? *

☐ Yes

☒ No

Project Narrative Score *

9 (1-10)

Rate this field on a scale of 1-10 with 10 being the highest.

Project Narrative Comments

The application effectively explained the project and this seems

Intent to Apply Form

Application

Status

Project Title *

Regional Business Support Project - R03

ORGANIZATION SUBMITTING APPLICATION

Organization Name *

City of EUNA

EDIT REVIEW COMPLETE

Phase 9: Award Recommendations/Denials and Final Award Approval

When the stages of the Application Process have been completed on any given Application (e.g. Reviewers finish submitting Reviews for the final Evaluation Stage), grantor agencies can begin making award decisions. Ensure reviews meet the minimum requirements as outlined in the [State Regulation](#).

9.1. Making Award Recommendations and Denials in ARM

1) Once reviews are complete, a *Submit for Decision* button will appear next to the Application title when viewing the Applications page.

Application & Review Management

Program: Economic Development FY2024 - ED05 [p-4299]

Home / Programs / Economic Development FY2024 - ED05 [p-4299] / Applications

OVERVIEW **APPLICATIONS** REVIEWS APPLICATION SETUP

Project Title	Submitter	Application Status	Start Date	End Date	Budget	Actions
[api-000170]	Anthony Torres	Not Started	04/01/2024	08/01/2024	\$0.00	
Regional Business Support Project - R07 [api-000169]	Anthony Torres	Completed			\$0.00	SUBMIT FOR DECISION
Regional Business Support Project - R06 [api-000168]	Anthony Torres	In Progress	04/10/2024	01/01/2025	\$0.00	

2) For an individual application, select *Submit for Decision* to access the decision options.

Program: Economic Development FY2024 - ED05 [p-4299]

Home / Programs / Economic Development FY2024 - ED05 [p-4299] / Applications

OVERVIEW **APPLICATIONS** REVIEWS APPLICATION SETUP

Project Title	Submitter	Application Status	Start Date	End Date	Budget	Actions
[api-000170]	Anthony Torres	Not Started	04/01/2024	08/01/2024	\$0.00	
Regional Business Support Project - R07 [api-000169]	Anthony Torres	Completed			\$0.00	SUBMIT FOR DECISION
Regional Business Support Project - R06 [api-000168]	Anthony Torres	In Progress	04/10/2024	01/01/2025	\$0.00	

3) The status of the application will update to “Pending Decision”

Home / Programs / Grantor Training... / Applications

Program: Grantor Training Test Program 2025 [p-5065]

OVERVIEW **APPLICATIONS** REVIEWS APPLICATION SETUP

Project Title	Submitter	Application Status	Start Date	End Date	Budget	Actions
Test Project [api-001055]	Brittany Murtaugh	Pending Decision			\$200.00	REVERT DECISION

4) Next, three options will be available to make a decision on the application:

- Recommend: Applications that will be awarded. Initiates transfer to Grants Network.
- On Hold: Can return to these applications at a later time to update the status.
- Denied: Applications that will be denied.

Program: Economic Development FY2024 - ED05 [p-4299]

Home / Programs / Economic Development FY2024 - ED05 [p-4299] / Applications

OVERVIEW **APPLICATIONS** REVIEWS APPLICATION SETUP

Project Title	Submitter	Application Status	Start Date	End Date	Budget	Actions
[api-000170]	Anthony Torres	Not Started	04/01/2024	08/01/2024	\$0.00	
Regional Business Support Project - R07 [api-000169]	Anthony Torres	Pending Decision			\$0.00	REVERT DECISION
Regional Business Support Project - R06 [api-000168]	Anthony Torres	In Progress	04/19/2024	01/01/2025	\$0.00	
Regional Business Support Project - R05 [api-000167]	Anthony Torres	In Progress	04/19/2024	08/01/2024	\$0.00	
Regional Business Support Project - R04 [api-000166]	Anthony Torres	In Progress	04/19/2024	08/01/2024	\$0.00	

Recommend
 On Hold
 Denied

- 4) Applications marked as “On Hold” or “Denied” can be returned to a prior stage by selecting *Revert* if the application status needs to be changed.

Program: Economic Development FY2024 - ED05 [p-4299]

Home / Programs / Economic Development FY2024 - ED05 [p-4299] / Applications

OVERVIEW APPLICATIONS REVIEWS APPLICATION SETUP

Project Title	Submitter	Application Status	Start Date	End Date	Budget	Actions
[api-000170]	Anthony Torres	Not Started	04/01/2024	08/01/2024	\$0.00	
Regional Business Support Project - R07 [api-000169]	Anthony Torres	Decision On Hold			\$0.00	REVERT RECOMMEND
Regional Business Support Project - R06 [api-000168]	Anthony Torres	In Progress	04/19/2024	01/01/2025	\$0.00	
Regional Business Support Project - R07 [api-000169]	Anthony Torres	Decision Denied			\$0.00	REVERT
Regional Business Support Project - R06 [api-000168]	Anthony Torres	In Progress	04/19/2024	01/01/2025	\$0.00	
Regional Business Support Project - R05 [api-000167]	Anthony Torres	In Progress	04/19/2024	08/01/2024	\$0.00	

- 6) When the Decision is marked as “Recommend”, all decision options will disappear from the Actions column and the Award Package may now be created and submitted.

NOTE: Applications marked as “Recommend” cannot be reverted. If an application was accidentally marked as “Recommend”, contact the GMO for assistance.

Program: Economic Development FY2024 - ED [p-3776]

Home / Programs / Economic Development FY2024 - ED [p-3776] / Applications

OVERVIEW APPLICATIONS REVIEWS APPLICATION SETUP

Project Title	Submitter	Application Status	Start Date	End Date	Budget	Actions
Regional Business Support Project [api-000054]	Anthony Torres	Decision Rec. Award			\$0.00	
Grants Station Area Economic Plan [api-000156]	Anthony Torres	Decision Rec. Award			\$0.00	
Economic Growth Initiative [api-000158]	Anthony Torres	Decision On Hold			\$0.00	REVERT RECOMMEND
Community Economic Development Sup... [api-000159]	Anthony Torres	In Progress	11/01/2023	10/01/2024	\$0.00	

- 7) All applications marked for Award Recommendation will appear on the Pending Awards table of the Program Detail page in Grants Network. See next section for how to create an award recommendation.

Show 25 entries

Search: "Economic Development FY2024 - ED"

Program Solicitations Hide Archived Programs

Department	Title	Program Type	Status	Total Funding	Actions
Learning & Adoption	Economic Development FY2024 - ED	N/A	Published	\$1,000,000.00	Actions

Showing 1 to 1 of 1 entries (filtered from 106 total entries)

Previous

View detail
Edit Solicitation
Preview Application
Reload

NOTE: The applicant will not be notified of their award until the Award Recommendation has been created in the next section. They will see their application as “Under Review” until that time.

9.2. Creating Award Recommendation in Grants Network

Now that the application has been marked as “Recommend” in ARM and is appearing on the Pending Awards table on the Program Dashboard in Grants Network, the grantor can create the award recommendation. Please note the required Subaward Agreement and corresponding attachments will need to be uploaded as a part of this process. See [Appendix B](#) for additional details on required documents.

NOTE: If issuing a Non-Competitive (Direct-to-Award) see [Appendix D](#), “Initiating Direct Awards” before following steps below.

Award Information

- 1) On the Program Detail page in Grants Network, find the Pending Awards table and select *Actions – Create Recommendation* for the award recommendation to be created.

Program Detail
High School Financial Literacy Supplemental Education - Test Published
Department: Department of Administration
Total Funding: \$500,000.00
Application Period: 12/05/2022 - 12/31/2022

[Subrecipient Reporting](#) [Subrecipient Monitoring](#) [Edit Solicitation](#) [Preview Application](#) [Ext. Solicitation Listing](#) [Application Workspace](#)

Award Recommendation Approval
You currently have no pending recommendation approvals. Click the reload button to refresh. [Reload](#)

[Initiate Direct Award](#)

Search:

Pending Awards

Project	Org Name	Award Manager	Award/ Contract Number	Recommendation Status	Current Approver	Actions
Learn Money Now	JDW Inc			Recommendation Pending	N/A	Actions

Showing 1 to 1 of 1 entries

Pending Awards

Project	Org Name	Award Manager	Award/ Contract Number	Recommendation Status	Current Approver	Actions
Learn Money Now	JDW Inc			Recommendation Pending	N/A	Actions

Showing 1 to 1 of 1 entries

[Previous](#) [View Details](#)

[Create Recommendation](#)

- 2) This will open the “Award Recommendation Approval Task Creation” page for this applicant. Enter information for all the following fields.

- a. Recipient: This is what the applicant entered as their Entity Legal Name in their application. This information is auto populated from their application and cannot be edited now. If needed, the recipients “Org Name” can be edited in the post-award stage by the grantor or the subrecipient through an amendment.
- b. Project: This is what the applicant entered as their Project Title in their application. This information is auto populated from their application and cannot be edited now. If needed, the recipients Project Title can be edited in the post-award stage by the grantor or the subrecipient through an amendment.
- c. Subrecipient: Select the subrecipient’s information from the drop-down options. If the subrecipient’s organization is not on the list, submit a [User Support Form](#) and select “Add Subrecipient to eCivis” as the Type of Issue. GMO is only able to add entities on the state financial system vendor list. If the entity is not a vendor, they need to register in Ocean State Procures (OSP). A subrecipient selection is required and helps the connection between the GMS and the state financial system. If the subrecipient field is left blank, invoices submitted by the subrecipient and approved in GMS will fail when sent to the state financial system for payment.
- d. Subrecipient Risk: Based on the agency’s assessment, select a risk level for this subrecipient. This selection can be updated in the post-award stage if needed.
- e. Award Manager: Select the person from the agency who will be the point of contact for this subrecipient. This selection does not impact the approval workflows set up in the Approval tab of the solicitation.
- f. External Note: Language entered here will show in the award notification email sent to the applicant once the award recommendation is approved. This can include congratulatory language, instructions for the applicant, etc. Sample language: “Congratulations! Please be sure to review the attached subaward agreement and upload a signed copy as soon as possible. Contact [agency email] if you have any questions or would like to schedule a meeting to review the terms of the subaward agreement.”
- g. Internal Note: – Language entered here will not show in the award notification email sent to the applicant. The Internal Note will be viewable by the state agency approvers.
- h. EIN: EIN of the applicant. If needed, the EIN can be edited in the post-award stage by the grantor or the subrecipient through an amendment.
- i. Award/Contract Number: The award number assigned to this subrecipient/project. This should match the Subaward Number on their respective subaward agreement.

- j. P.O. Number: This field will be used for Cost Center and Project Code, if used by your agency. Format should be Cost Center-Project Code. If the agency does not use Cost Center, but uses Project Code, enter a dash first (e.g., -Project Code). If neither are used, leave blank.
- Cost Center only: Enter Cost Center in the state financial system format (e.g. 72:102200104)
 - Project Code only: Enter a dash before the Project Code with no spaces (e.g. -310AA)
 - Both: Enter Cost Center, dash, Project Code with no spaces (e.g. 72:102200104-310AA) Do not enter a Purchase Order number.
- k. Project Type: Select *Construction* or *Non-Construction* from the drop-down list.
- l. Performance Period Start: – The start date of the subrecipient’s performance period. This information should match the performance period start date on their respective subaward agreement.
- m. Performance Period End: – The end date of the subrecipient’s performance period. This information should match the performance period end date on their respective subaward agreement. If needed, this date can be edited in the post-award stage by the grantor or the subrecipient through an amendment.

Award Budget

- 1) Next, the award budget needs to be completed. Select the hyperlinked *Award Budget* to open a copy of the budget submitted with the application in a new window.

View/Edit Award Budget: [Award Budget](#) 

Total Budget Requested: \$50,000.00 [Refresh Award Total](#)

Total Match Requested: \$0.00

View/Edit Application goals: [Application Goals](#) 

- 2) When the budget opens, review and make changes, if needed, to finalize the award budget. The Budget Summary section at the top of the page will show the total request amount from all budget categories. Selecting the hyperlinked budget category title (i.e. Personnel) will open the category to view and edit line items. Title, Description, Units, Unit Cost, Extended Cost, Cost, GL Code, and Item Type fields can all be edited. If needed, additional rows can be added, or rows removed by right selecting the desired row.

Budget Summary

\$50,000.00	Total Direct Costs	\$0.00	Match / Cost Share
\$0.00	Total Indirect Costs	\$0.00	Program Income
\$50,000.00	Total Amount (Direct + Indirect)		

Budget Settings

Budget Items

1. PERSONNEL

		Ext Cost	Direct Cost	Ind Cost	Cost Share
PERSONNEL Totals:		\$15,000.00	\$15,000.00	\$0.00	\$0.00

Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Item Type
Regular Wages	Regular Wages	1.00	\$15,000.00	\$15,000.00	\$15,000.00		Direct Cost

Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Item Type
Regular Wages	Regular Wages	1.00	\$15,000.00	\$15,000.00	\$15,000.00		Direct Cost

Insert row above
 Insert row below
 Remove row

NOTE: In the post-award stage, subrecipients will only be able to request funding in the budget categories that they were awarded. Funding can be moved between budget categories in the post-award stage using the amendment functionality.

- 3) Once all necessary changes to the budget have been made, scroll down to the bottom of the page and select *Save Changes*.

Save Changes

Discard Changes

- 4) **NOTE:** If needed, the submitted Budget Narrative section can also be edited. If any changes are made, select *Save Narrative*.

Budget Narrative

Enter your budget narrative below.

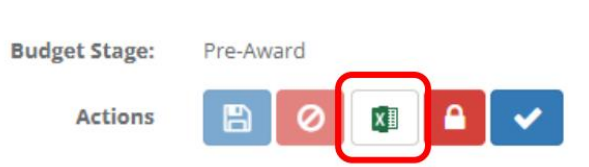
</>
H1
H2
H3
B
I
U

Example Narrative

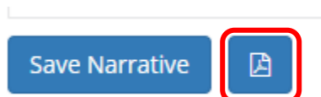
Save Narrative

📎

- 5) To download a copy of the awarded budget for the Subaward Agreement appendices, select the Excel icon next to *Actions* to export the awarded budget.



- 6) To download a copy of the awarded budget narrative for the Subaward Agreement appendices, select the PDF icon in the “Budget Narrative” section.



- 7) Once the changes have been made and saved, exit out of the browser tab. Once closed, it will return to the tab with the Award Recommendation Task. A pop-up asking for confirmation that the budget is done being edited will appear. The page will automatically update the award total amount. Select *Done* to complete budget portion of award recommendation.

Award Goals

- 1) To review and/or make any changes to the applicant’s goals before awarding, select the hyperlinked *Application Goals*.



- 2) Similar to the budget, this will open the applicant’s goals that were submitted with their application. If needed, edits can be made to their goals. Once complete, select *Save Goals* and exit out of the browser tab to return to the tab with the Award Recommendation Task.

Application Goals for Katje's Organization

Program: Detailed Financial Reports
Project name: Award Rec Example

Goal / Objective	Target Units	Direct Cost Expenditure	Matching Expenditure	Program Income Expenditure
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 Restaurants	0.00	\$ 0.00	\$ 0.00	\$ 0.00
Small Business Theaters	0.00	\$ 0.00	\$ 0.00	\$ 0.00

Return to Application **Save Goals**

NOTE: This option will not appear if no Goals were created in the Solicitation.

Allocate Funding

In this section, there will be a list of funding sources that were added to the Financial tab of the program solicitation. Here funding can be allocated to this subrecipient from one or multiple funding sources.

- 1) Scrolling down the page, the Allocate Funding table will show all available funding sources to fund this award. Fill out the table to determine what funding sources will be used for this award.

NOTE: The “Award Total” must match the “Total Budget Requested” amount. If these two do not match, an error message will appear.

Allocate Funding:	Total Funding	Funding Available	Subrecipient Award
ORG0009 Cancer Prevention and Control Programs for State, Territorial and Tribal Organizations - FY21	\$ 60,000.00	\$ 60,000.00	\$ 0.00
US11417 The Community Forest and Open Space Conservation Program (CFP) - FY 2022	\$ 5,000.00	\$ 5,000.00	\$ 0.00
Demo General Fund FY2022	\$ 5,000.00	\$ 0.00	\$ 0.00
Award Total			\$ 0.00

- 2) If there is a match requirement, the match amounts would be entered here. From the drop-down list, None, Cash, In-Kind, or Cash/In-Kind can be selected. Making this selection allows the subrecipient to report Match to the grantor in Financial Reports/Payment Requests in the post-award stage. Similar to the Award Total above, Total Match amount must equal the Total Match Requested amount.

Match Type:	None	Total Match
Cash Match Total:	\$ 0.00	In-Kind Match Total: \$ 0.00
		\$ 0.00

- 3) If grantor selected “Detailed Financial Reports” in the Submission tab of the program solicitation before publishing, GL codes need to be confirmed. If pre-determined options were input for Detailed Financial Reports, those options will appear next. Use the check boxes to determine which options will appear for this specific subrecipient.


Manage GL Codes/Descriptions:		
	Include GLCodes	Amount
<input type="checkbox"/>		
<input type="checkbox"/>	GL CODE 1	\$ 0.00
<input type="checkbox"/>	GL CODE 2	\$ 0.00
<input type="checkbox"/>	Include Descriptions	Amount
<input type="checkbox"/>	DESCRIPTION 1	\$ 0.00
<input type="checkbox"/>	DESCRIPTION 2	\$ 0.00

NOTE: Grantor will select these options for each intended subrecipient. Based on these selections, the subrecipient will be able to view and select from them when submitting Financial Reports/Payment Requests in the post-award stage. The amounts entered in the Amount column do not impact the subrecipient budget or restrict the amount of funding they can request. Therefore, GMO recommends leaving values in the Amount column at zero.

Reporting Frequency and Closeout

The next section of the Award Recommendation Task is defining the reporting frequency for the subrecipient. If a reporting cadence for Financial Reports and Activity Reports was entered in the Approval tab of the program solicitation, reporting cadences will auto populate, but can also be edited.

- 1) Select the frequency and interval of Financial Reports and/or Activity Reports by completing required questions.
- 2) Use the “Reset to Program Default” button to return frequency to what is listed in the Approval tab of the solicitation.


Define an optional frequency for the Financial Report task 


[Reset to program default](#)


Frequency:

Interval:

On: ☐ A day of the month
☒ The last day of the month

Starting: 

Until: 


Define an optional frequency for the Activity Report task 


[Reset to program default](#)

Frequency:

Interval:


On: ☐ A day of the month
☒ The last day of the month

Starting: 


Until: 


NOTE: It is not required to use this functionality. Financial Reports and Activity Reports can be submitted by subrecipients on a one-off/as-needed basis.

- 3) After selecting reporting frequency (optional), the grantor should define dates for the subrecipient closeout task. This task is to remind subrecipients to submit their final closeout task (final financial report) to officially close their award.
- 4) The dates in these fields auto populate based on the Performance Period End Date entered at the top of the Award Recommendation Task page but can be edited.

Define dates for the closeout task 

[Reset to program default](#)

Closeout Task Due Date: * 

Closeout Task Reminder date: * 


Files and Notes

This section includes award notification language and the upload of required documents as part of the award recommendation process.

- 1) First option in this section is the “Award Notification File”. This is autogenerated by the GMS and contains information specifically required in the Uniform Grant Guidance. An example of what the autogenerated message can be found in [Appendix I](#). If the agency has their own award notification file to include, upload the file here. The Award Notification File will be sent to the applicant attached to their award email, as well as included in their Award Files folder.

Award Notification File

The award notification file contains information specifically required in the Uniform Guidance. You may replace the default file, but please ensure it contains the necessary information as required by [2 CFR 200.331](#).



- 2) Next, the Subaward Agreement, Appendix I, and all other required appendices need to be uploaded in the “Award Files – External” section. Use the *Attach Files* button under that heading to add the required Subaward Agreement documents.

NOTE: The Subaward Agreement Template includes all federally required fields, per [2 CFR 200.332](#). The Subaward Agreement Guide, Template, and Appendix I are available in Grants Network, by navigating to *Grant Management > Organization Documents* tab.

- 3) Grantors also have the option to add files that will only be viewable to the state agency users. Under the “Award Files – Internal” header, select files to add any grantor only files.

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

Attach Files

Search:

File Name	Uploaded Date	File Size	Actions
No files have been uploaded			

Showing 0 to 0 of 0 entries

[Previous](#) [Next](#)

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

Attach Files

Show entries

Search:

File Name	Uploaded Date	File Size	Actions
No data available in table			

9.3. Completing Award Recommendation and Final Approval

Once all required components of the award recommendation above have been completed, the Award Recommendation Task can be sent for approval. See [Appendix H](#) for all approval workflow status' an award recommendation may go through during this process.

Completing the Award Recommendation Approval Workflow

- 1) At the bottom of the page, select *Send for Approval*. This will send the recommendation to the “Award Recommendation” approval workflow selected in the Approval tab of the solicitation.
- 2) If needed, a draft of the Award Recommendation Task can always be saved by selecting *Save Recommendation*. This saves any edits/changes and allows user to come back later to finish creating the Award Recommendation or allow multiple members in the grantor agency to contribute to the award recommendation process.
- 3) Selecting *Cancel* will close the Award Recommendation and not save any changes.

Save Recommendation

Send for Approval

Cancel

- 4) Once sent for approval, the status will update from “Recommendation Pending” to “Pending Recommendation Approval” until all members of the approval workflow have approved.

Pending Awards

Project	Org Name	Award Manager	Award/ Contract Number	Recommendation Status	Current Approver	Actions
Planting Trees 2023	Katje's Organization	K. Benoit	RI-23-0001	Pending Recommendation Approval	Katje Benoit	Actions

- 5) Follow the approval workflow as demonstrated in [Appendix H](#).
- 6) The last step in this process is the Final Award Approval. Once the award package has been approved and sent to the subrecipient, they can then review the package and take action, including accepting the award, requesting changes to the award, or declining the award.
 - a. If subrecipient requests changes: The award will update to “Subrecipient Changes Requested”.
 - Under the Actions column, select *Edit Recommendation* to re-open their Award Recommendation and view the changes they have made/requested.

Pending Awards

Project	Org Name	Award Manager	Award/ Contract Number	Recommendation Status	Current Approver	Actions
Planting Trees 2023	Katje's Organization	K. Benoit	RI-23-0001	Subrecipient Changes Requested	N/A	Edit Recommendation View Award Package View Budget View Goals

Showing 1 to 1 of 1 entries

[Previous](#)

- Once back in the Award Recommendation Approval Task Creation page, any changes requested by the subrecipient will be noted at the top of the page.

Award Recommendation Approval Task Creation

Changes Requested: Moved money from the Personnel budget category to the Travel budget category.

- To make any changes to the Award Recommendation, or remove any changes made by the subrecipient, follow the instructions in this section of the guide. Once changes have been saved, the Award Recommendation will again go through the internal approval workflow before being sent back to the subrecipient to review and accept.
- b. If subrecipient accepts award as is: The award status will update to “Pending Final Approval” and enter the Final Approval workflow.

Pending Awards

Project	Org Name	Award Manager	Award/ Contract Number	Recommendation Status	Current Approver	Actions
Planting Trees 2023	Katje's Organization	K. Benoit	RI-23-0001	Pending Final Approval	Katje Benoit	Actions

Completing Final Award Approval Workflow

This is the final step to move an applicant to become a subrecipient. Follow the steps below to complete the Final Award Approval Workflow to complete the awarding process.

- 1) Once the Final Approval workflow has been initiated, the first approver will be notified via email of their pending task. A user can see their all-pending tasks in the “Pending Tasks” table on the Program Dashboard in the GMS. In the Actions column, select *Review*.

- 2) This will open the Final Award Approval page. Here, approvers can view award details, the budget, goals, and any files uploaded and submitted by the subrecipient.

NOTE: In this step, ensure that the entity has signed and uploaded their subaward agreement. Their signed agreement must be downloaded by a Final Approval approver, fully executed by the authorized person at the agency, and re-uploaded by an approver in the "Award Files – External"

- 3) Below is an example of a Final Award page for reference.

Award Details

Subrecipient: A New Leaf - 124 Main Street
Organization: Katje's Organization
Project: Planting Trees 2023
Approved Amount: \$2,000.00 
Total Federal Award: \$0.00
Total Other Award: \$2,000.00
Total Match: \$0.00
Period of Performance: 01/01/2023 - 12/31/2023

Program: Direct Award Test2
Award/Contract Number: RI-23-0001
EIN: 12-3456789
Subrecipient Risk: Low

Internal Note: Award Rec created on 12/29. Subaward agreement attached and ready for signature by subrecipient.

Note from applicant:


I have attached my signed subaward agreement. Thank you!

View/Edit Award Budget: [Award Budget](#) 

View/Edit Award Goals: [Application Goals](#) 

Award Files (from applicant):

Search:

File Name	File Size	Created On	Actions
Subaward Agreement.docx	11.7 Kb	12/30/2022	

Showing 1 to 1 of 1 entries




[Previous](#) [1](#) [Next](#)

Award Files - External:

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

[Attach Files](#)

Search:

File Name	Uploaded Date	File Size	Actions
Award Acceptance User Guide.docx	12/30/2022	11.7 Kb	
Subaward Agreement.docx	12/30/2022	11.7 Kb	
Terms and Conditions.docx	12/30/2022	11.7 Kb	

Award Files - Internal:

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

[Attach Files](#)

Show entries

Search:

File Name	Uploaded Date	File Size	Actions
No data available in table			

Showing 0 to 0 of 0 entries

[Previous](#) [Next](#)

[Approve](#) [Return to Applicant](#) [Decline](#)

- 4) After everything from the award recommendation has been reviewed there are 3 actions that can be taken by the approver.
 - a. Approve: If the subrecipient has uploaded all files and the fully executed subaward agreement has been uploaded, the award is ready to be finalized. If part of an approval workflow, the Final Award approval will be sent to the next approver in line for them to review. When the final member of the approval workflow approves, it will finalize this entity as a subrecipient. They can begin post-award activities (adding team members, submitting payment requests, submitting activity reports, etc.).
 - b. Return to Applicant: If any changes need to be made to the Award Package, Budget, or Goals, or uploaded files, this action can be used to send the award package back for edits. The subrecipient will be notified of this action and can log back into their eCivis Portal to make the requested changes.
 - c. Decline: If the agency no longer wishes to award this entity, selecting the *Decline* button will end their award package here. The entity will be notified via email that their application has been denied and they will not be funded through this grant program (see [Appendix I](#) for example of the email sent to the applicant if their award package is declined). This action is not reversible. If changes need to be made to their budget or award package, utilize the *Return to Applicant* button and not the *Decline* button.
- 5) Once all approvers in the Final Approval workflow approve the Award Package response, the applicant becomes a subrecipient and they will be notified via email that their award has been finalized. The entity will move down into the Subrecipient Awards part of the Program Detail page in the status Awarded.

Subrecipient Awards								
Project	Organization	Award Manager	Award/ Contract Number	Award Type	Status	Contract Start	Contract End	Total Award
Goals Test	Katje's Organization	K. Benoit	RI-TEST-2022-003	N/A	Awarded	08/11/2022	05/30/2023	\$500.00
Subrecipient Test	TrinlaSmith Inc	K Benoit	RI-TEST	N/A	Awarded	11/01/2022	12/30/2024	\$2,500.00

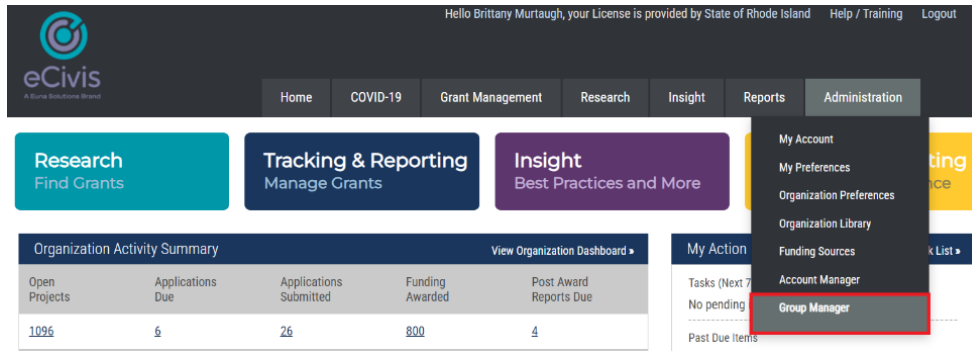
The Pre-Award process is now complete. Please see the Grantor Post-Award User Guide for all post-award activities.

Appendix A: How to Create User Groups for Approval Workflows

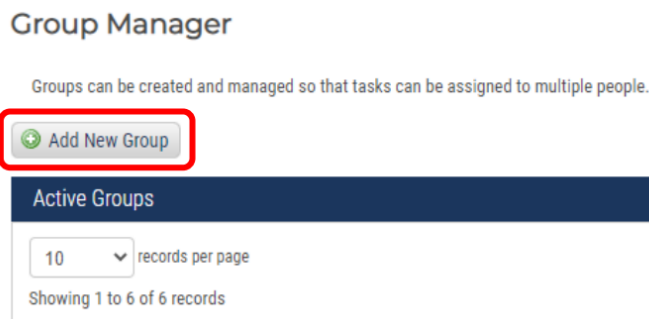
Workflows are set up in the Approval tab of a Solicitation. Workflows can be edited at any time throughout the duration of a grant program. Before adding user groups to approval workflows, they must be created. For complex workflows, multiple groups can be created and organized into a workflow.

NOTE: User groups can only be set up by Department Master Account Holder (DMAH) users.

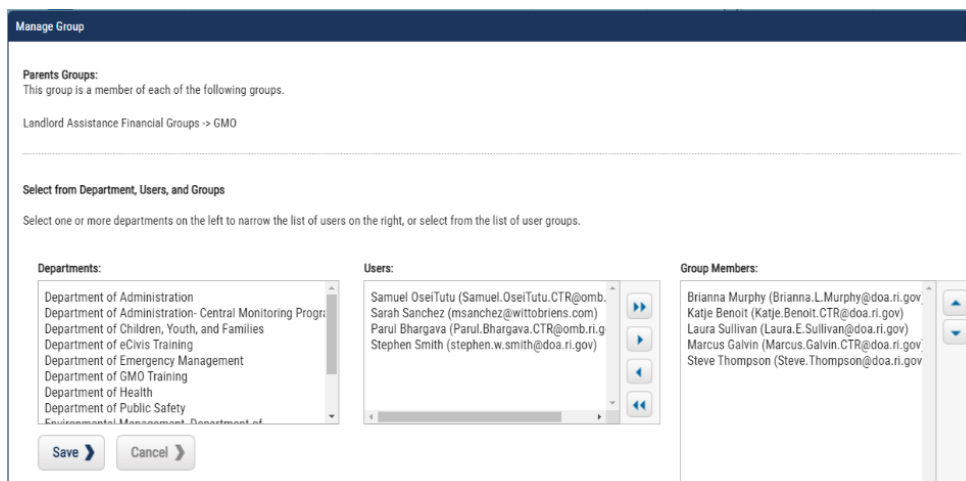
- 1) To create a user group hover over the Administration tab and select Group Manager



- 2) Select *Add New Group*.



- 3) A new group form will appear allowing user to create a group. Make sure the Group Name is easily distinguishable to the team managing the program. There are 2 types of groups that can be created:
 - a. Standard Group: an item is sent to all members of a Standard group at the same time. Any member from this group can review/approve the item. Only one approval is needed for the item to be approved.



- b. Sequential Group: an item is sent to all members of a Sequential group in the order they are listed when creating the group. For example, if the sequential group is made up of Laura, Steve, and Brianna, the item is first sent to Laura, once Laura approves it the item is sent to Steve, once Steve approves it the item is sent to Brianna, and once Brianna approves it, the item is officially “approved”.

The screenshot shows the 'Add New Group' form. The 'Group Name' field contains 'SEP Grant Activity Reviewers'. The 'Description' field contains 'Sequential workflow of staff members to review subrecipient goals and submitted activity reports for SEP grant program'. The 'Type' field has 'Sequential' selected with a radio button. Below the form, there are three columns: 'Departments', 'Users', and 'Group Members'. The 'Departments' column has a list of departments with 'Department of Administration' selected. The 'Users' column has a list of users with 'Anna Haney (ahaney@ecivis.com)' selected. The 'Group Members' column has a list of group members with 'Laura Sullivan (Laura.E.Sullivan@omb.ri.gov)' selected. A red arrow points to the 'Group Members' column.

- If selecting a Sequential workflow, a previously created group can be added to this new group workflow. For example, someone from “Programmatic Team” needs to approve before someone from “Finance Team” approves. Once the “Sequential” radio button is selected, a list of previously created groups will appear. Put users/user groups in the required order.

The screenshot shows the 'Add New Group' form with the 'Sequential' workflow selected. The 'Group Members' column now includes 'Programmatic Team Group (standard)' and 'Finance Team Group (standard)'. A red arrow points to the 'Group Members' column. Below the 'Users' column, there is a 'Groups' section with a list of previously created groups, including 'Anna and Cynthia Group (standard)', 'GMO (standard)', 'Grant Approval Group- Sequential (sequential)', 'Internal Subaward Test (standard)', 'Landlord Assistance Financial Group (sequential)', 'OHCD CDBG Approval Path (sequential)', 'OHCD CDBG Program Group (standard)', and 'Super Grant Approval Group (sequential)'. A red box highlights the 'Groups' section.

- 4) Once the group has been created, select Save. This group can now be selected when setting up the Approval Workflows in the solicitation.

Appendix B: Required and Recommended Language and Files

Recommended Language for Technical Assistance

Applicants may have questions while completing their application. We encourage agencies to be clear about who to contact for their type of question. Program specific questions should go to the contact listed in the Contact tab of the solicitation. Technical questions about the use of eCivis Portal should be submitted via User Support Form. See suggested text below to be added to the Overview or Contact tab of the solicitation.

“If you experience any technical difficulties with eCivis Portal while submitting your application, please submit a [User Support Form](#) to the Grants Management Office for assistance. Technical questions can be addressed via this form, but all questions relating to the grant program, application questions, and content of the solicitation should be sent to the contact listed in the Contacts tab.”

Recommended Language for Resources

To ensure that applicants have access to all the user guides and trainings available on the Grants Management Office webpage, it is suggested the text below be added to the Overview or Contact tab of the solicitation.

“Resources and user guides are available to for applicants to assist with eCivis Portal Access, application submission guidance, requirements for applying to and accepting an award, and much more. Please visit the [Resources for Subrecipients](#) webpage for more information.”

Recommended Files

The Grants Management Office has a variety of user guides and documents that can assist applicants in the application and award acceptance process. The files below can be added to the Files tab of the solicitation to provide additional support in these processes.

- [eCivis Portal Access and Login User Guide](#): Assist applicants in creating an eCivis Portal account and troubleshooting login errors.
- [FAQ for Applicants and Subrecipients](#): This document answers frequently asked questions from applicants and subrecipients.
- [How to Submit an Application](#): This will walk applicants through the step-by-step process of submitting an application.

Required Certification Language for Approval tab of Solicitation

Certification language must be entered in the *Approval* tab of the solicitation under the “Financial Report Approval” and “Closeout Approval” workflows. The *Display acknowledgment statement* button must be selected as “Yes”, and the language below should be entered.

NOTE: The GMS has auto-populated a version of the acknowledge statement below. Remove the auto-populated statement and replace it with the text below.

Overview

Eligibility

Financial

Contact

Files

Please define an approval workflow for each of the tasks below*

Task Type	Approver	Workflow
Recommendation Approval	Brittany Murtaugh	Standard
Final Award Approval	Brittany Murtaugh	Standard
Activity Report Approval	Brittany Murtaugh	Standard
Financial Report Approval	Brittany Murtaugh	Standard
Amendment Approval	Brittany Murtaugh	Standard
Amendment Approval with Finance	Brittany Murtaugh	Standard
Grantor Amendment Approval	Brittany Murtaugh	Standard
Grantor Amendment Approval With Finance	Brittany Murtaugh	Standard
Grantor Amendment Final Approval	Brittany Murtaugh	Standard
Return of Funds Approval	Brittany Murtaugh	Standard
Closeout Approval	Brittany Murtaugh	Standard

Display acknowledgement statement:*

☒ Yes ☐ No

Acknowledgement Statement:*

Source **B** **I** **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.

body p em

Required Certification Language

“By submitting this report, I certify to the best of my knowledge and belief that the report is true, complete, and accurate. I am aware that the provision of any false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil or administrative consequences including, but not limited to violations of U.S. Code Title 18, Sections 2, 1001, 1343 and Title 31, Sections 3729-3730 and 3801-3812. I am aware such consequences may include penalties for fraud, false statements, or false claims. I further certify that the expenditures, disbursements, and cash receipts are for the purposes and objectives set forth in the terms and conditions of the Subaward Agreement. 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.”

Appendix C: How and Why to Select Detailed Financial Reports in the Solicitation

In the pre-award process of solicitation creation, there is an option to include “Detailed Financial Reports” for post-award reporting by subrecipients. The selection to “Collect Detailed Financial Reports” needs to be made before a solicitation is published. If this selection was made before the solicitation was finalized and published, the assignment of Detailed Financial Report Descriptions and GL Codes to each subrecipient occurs during the Award Recommendation task creation. If needed, Descriptions and GL Codes can also be assigned during the post-award phase. To include Description and GL Code options for subrecipient reporting.

- 1) Select *Detailed Financial Report Options* on the Submission tab of the solicitation.

Solicitation Edit

Overview ✓ Eligibility ✓ Financial ✓ Contact ✓ Files ✓ **Submission ✓** Goals ✓ Approval ✓

Step 6 of 8 * Required for Section Completion

Primary Workspace Email*
The primary workspace email will receive notifications when an application is submitted.

Accept multiple applications per user*
☒ Yes ☐ No
Note: Once a solicitation has been published, this selection may not be changed.

Budget Development*
Would you like your applicants to create a budget within the eCivis Portal? This will also be used to track spending during post award.
☒ Yes ☐ No
Note: Once a solicitation has been published, the budget template may not be changed.

Contract Number*
Would you like to have Grants Network autogenerate a contract number when an award is made?
☐ Yes ☒ No
Prefix:
Note: Contract Number prefix must be unique for your Organization. A -XXXX will be appended to all contract numbers.

☒ **Collect Detailed Financial Reports** ⓘ

Detailed Financial Report Options ➤

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

Note: All application submission deadlines default to 11:59 EST. If you would like your application period to close at a different time, please indicate the time and time zone, in the notes section below.

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

Save ➤ **Done** ➤

- 2) A pop-up will appear where the GL Codes and Descriptions can be added for subrecipients to choose from when submitting Financial Reports (Payment Requests). To help the subrecipient distinguish which GL Codes/Activities are used for each budget category, it is suggested to prefix the GL Codes with the budget category intend. Example below:

Add GL Code >

Add Description >

Search:

Name	Type	Actions
Fringe Benefits - Engineer	GL Code	Edit Delete
Personnel - Engineer	GL Code	Edit Delete
Personnel - Project Manager	GL Code	Edit Delete
Solar Energy Funds	Description	Edit Delete
Wind Energy Funds	Description	Edit Delete

10 records per page

← Previous 1 Next →

Close >

- 3) During Award Recommendation, each subrecipient can be assigned individual GL Code fields that will appear when they are submitting Financial Reports. Example below.

Category	Spend	Match	Award Approved	Match Approved
1. PERSONNEL	\$ 0.00	\$ 0.00	\$ 5,000.00	\$ 0.00
GL Code / Activity	Spend	Match	Description	
Personnel - Project Man	0.00	\$ 0.00	Solar Energy Funds	+ / -
	0.00	\$ 0.00	Wind Energy Funds	+ / -
Personnel - Engineer	0.00	\$ 0.00		
Personnel - Project Manager	0.00	\$ 0.00		

NOTE: If the checkbox marked “Collect Detailed Financial Reports” is selected when the solicitation is published and add or assign drop-down options, subrecipients will be given a free-form text field to enter information in the GL Code/Activity and Description fields above when submitting Financial Reports (Payment Requests).

Appendix D: Special Circumstances for Non-Competitive/Direct-to-Award Programs

The Non-Competitive/Direct-to-Award process involves special circumstances and considerations during the pre-award stage. Please review all information in this section while editing the solicitation.

Phase Workflow

If issuing a Non-Competitive/Direct-to-Award program, Phase 3, Phase 5, and Phase 6 can be skipped. All other Phases of this guide should be followed.

Solicitation Contents

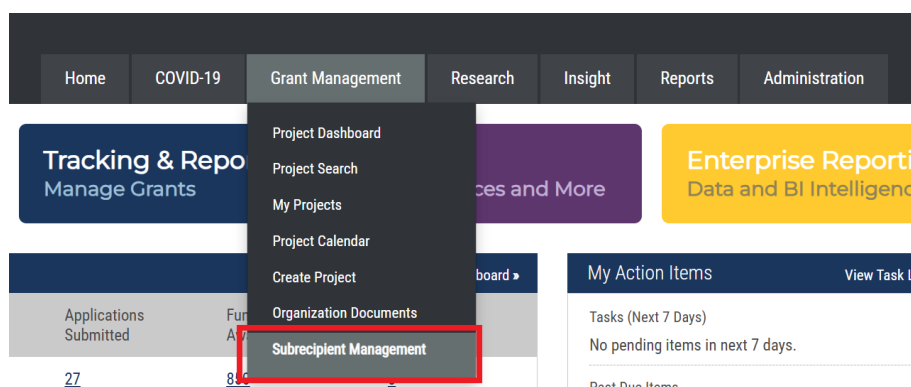
Agencies should continue to provide as much information as possible in the solicitation as outlined in in [Phase 2](#). Subrecipients should be informed and review all program information prior to accepting a grant award. It is up to the agency to provide that information via the solicitation. The fields below are not relevant or have differing instructions for the Non-Competitive process, but all other fields should be complete.

- 1) Review tab: The “Review” tab will not appear in solicitations that were created as “Direct Award Process” programs.
- 2) Overview tab - Listing Availability: This should be marked as “Private”, unless there is a special circumstance where this program is open to public view.
- 3) Submission tab: The “Accept Multiple Applications Per User” field will not appear.
- 4) Goals tab: The “Goal Notes” field does not need to be completed as no application will be submitted.

Initiating Direct to Awards

For grant programs that are not competitive, Direct Award functionality will be used. Direct Awards skip the application and review process and start at the award initiation. Reminder: A waiver must be approved through the Grants Management Office before any direct awards can be initiated. Follow steps below to initiate the direct awards.

- 1) Navigate to the “Grants Management” tab and select *Subrecipient Management*.



- 2) Find the grant program from the list of solicitations in the “Program Solicitations” table. Once found, click the hyperlink title to access the “Program Details” page.

Program Solicitations ⓘ ☑ Hide Archived Programs

Department	Title	Program Type	Status	Total Funding	Actions
Department of Administration	High School Financial Literacy Supplemental Education - Test	N/A	Published	\$500,000.00	Actions

- 3) On the Program Details page, select the blue Initiate Direct Award button.

Program Detail

Direct Award Test Published

Department: Department of Administration

Total Funding: \$55,000.00

Application Period: 09/01/2022 - 09/30/2030

Subrecipient Reporting ▾

Subrecipient Monitoring

Add Task ▾

Edit Solicitation

Preview Application [↗](#)

Ext. Solicitation Listing [↗](#)

Award Recommendation Approval

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

[Initiate Direct Award](#)

Pending Awards

There are currently no award recommendations for this solicitation. Click the reload button to refresh.

- 4) An Award Initiation pop-up will appear. To initiate a Direct Award, 3 pieces of information are needed. The email address of the subrecipient, a Project Title, and an External Note that will be included in the automatic email sent to the subrecipient. Once entered, select the green *Initiate Award* button.
- NOTE:** The email address entered here is the user that will need to go through the award acceptance process. Once their award is finalized and they are a subrecipient, they can add more team members to the award to help them manage post-award activities.

This will allow you to initiate an award recommendation that is not tied to an application.

Subrecipient email: * ⓘ

Project title: *

External note: *

H1 H2 H3 B I U

5000 characters remaining.

[Initiate Award](#) [Cancel](#)

- 5) If the subaward program has multiple subrecipients, repeat this process to invite each one.
- 6) Once the invite has been initiated, it will appear under the Pending Awards table on the Program Detail page. The status will be Pending Subrecipient Response (Direct). Under the Actions column, users can choose to resend the invitation (if needed) or cancel the invitation. Cancelling the invitation will make the link in the email sent to the subrecipient invalid so they can no longer accept the award. An example of the Direct Award initiation email sent to the subrecipient can be found in [Appendix I](#).

Pending Awards

Project	Org Name	Award Manager	Award/ Contract Number	Recommendation Status	Current Approver	Actions
Chamber of Commerce FY22	katje.benoit.ctr@omb.ri.gov			Pending Subrecipient Response (Direct)	N/A	Resend Invitation Cancel Invitation

Showing 1 to 1 of 1 entries

Previous Next

- 7) Once the subrecipient has accepted the direct award invitation, their status will update to “Recommendation Pending (Direct)”. To begin creating the Award Recommendation for this subrecipient, return to section 9.2 and follow the instructions to create the award recommendation.

Pending Awards

Project	Org Name	Award Manager	Award/ Contract Number	Recommendation Status	Current Approver	Actions
Chamber of Commerce FY22	Katje's Organization			Recommendation Pending (Direct)	N/A	Create Recommendation

Showing 1 to 1 of 1 entries

Previous Next

Appendix E: Form Functionality in ARM

In the Application and Review Manager (ARM), Forms are what grantor agencies build to collect the application or review information they require for their program. This section will review the functionality available while building a form.

Initiating Form

- 1) Following the instructions from [Phase 4 Section 3](#), a new Form is created once the “From Scratch” button is selected. The Program Name will be automatically added to the Form Layout box at the top of the page. First, add the following formation.
 - a. Form Name: Name of Form (viewable to both the grantor an applicant)
 - b. Form Instructions: Any specific instructions that relate to the prompts in this form only.

Form Elements Toolbox

There are four categories of Form Elements for Application and Review Forms that include format/layout options and a variety of field types. See below for options available to customize a form. These options can be found on the righthand side of the Form page while in the “Setup Form” tab.

- 1) **Layout:** Create groupings of fields, rows, columns, and other formatting preferences.
 - a. Line Break: Creates a line break between sections of the form.
 - b. Grouping Start: Creates a grouping box around any fields below this element but above the next “Grouping End”.
 - c. Grouping End: Creates a grouping box around any fields above this element but below the next “Grouping End”.
 - d. Two Column Row: Creates a split row for two form elements to display side-by-side within a single row. Drag a form field into column row to add.
 - e. Three Columns Row: Creates a split row for three form elements to display side-by-side within a single row. Drag a form field into column row to add.
 - f. Four Columns Row: Creates a split row for four form elements to display side-by-side within a single row. Drag a form field into column row to add.
- 2) **Typography:** Display important information with no response from applicant/reviewer.
 - a. Instructions: Provides a box of instructional text to be displayed
 - b. Header Text: Provides a text heading to place above sections of the form
 - c. Paragraph: Provides a piece of long-form text to be displayed above specific fields or sections of the form
 - d. Label: Provides a piece of long-form text to be displayed above specific fields or sections of the form
 - e. Tags: Provides a prompt and a list of available tag from which the user can select as many as are applicable
 - f. Website: Provides a URL with the option to label the line as needed
- 3) **Controls:** Create the content for applicants and reviewers to complete (questions/prompts)
 - a. Text Input: Allows for input of a short amount of text, typically one line
 - b. Text Area: Allows for input of a large amount of text, typically paragraphs of information
 - c. Email Input: Formatted for email address input
 - d. Phone Number: Formatted for phone number input
 - e. Number Input: Allows for numerical values, including formatting for currency
 - f. Dropdown: Allows for a user to select from a predetermined list of options presented as a dropdown. Users can select only one option.
 - g. Checkboxes: Allows for a user to select one or more options from a pre-determined list of options presented as checkboxes

h. Radio Button: Allows for a user to select from a pre-determined list of options presented as radio buttons. Users can select only one option.

i. State Picker: Pick from a pre-populated list of States

j. Calculator: Configure to display a value that calculates from other numerical fields in the form

NOTE: Review Forms also come with a calculated “Total Score” display at the bottom of the form, allowing users to simply flag any numerical fields to add into that total score while they are building out the review form.

k. Date Picker: Allows for a user to pick a date from a calendar view

l. Start/End Date: Allows for a user to pick a start and end date while viewing a calculation of total time and remaining time

m. Rating: Allows for a user to provide a rating against a provided prompt using a five-star scale

n. Link Input: Allows for a user to provide an external link and a link label

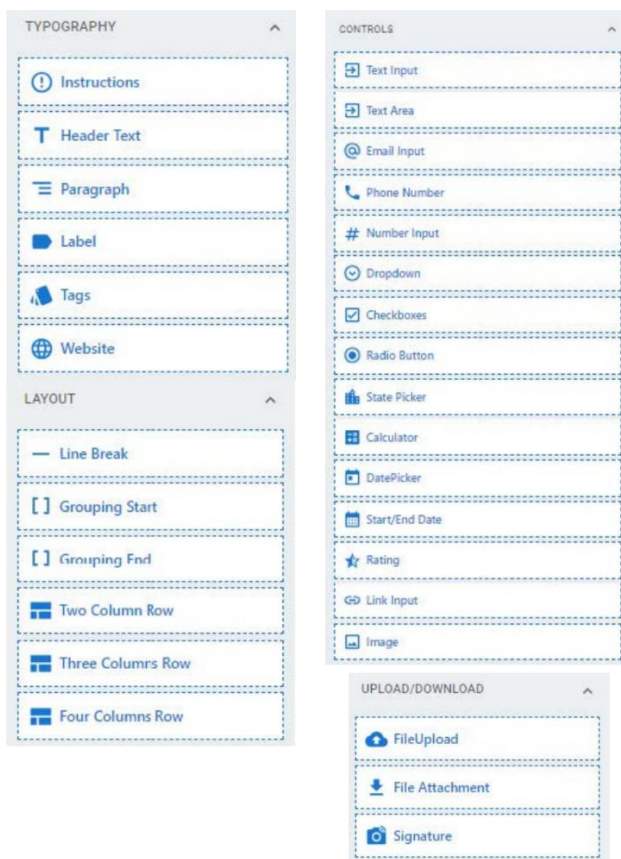
o. Image: Places an image within the form to be viewed by the submitter

3) **Upload/Download**: Use these to collect files and drawn signatures from applicants or to post a file for applicants to download.

a. File Upload: Allows for a user to upload a file

b. File Attachment: Places a downloadable file within the form to be downloaded by the submitter

c. Signature: Allows for a user to draw a signature



Editing Form Fields

- 1) To name and edit the options for a field, select the pencil icon.

- 2) A panel will open to the left of the page with options to edit three categories of field settings: Element Parts, Print Options, and Business Logic.

- 3) Element Parts and Print Options:
 - a. Label: Enter the text that should display over this field
 - b. Element ID: The unique identifier for this field. Use this, for example, when creating business logic for other fields to show based on an applicant/reviewer's response to this field.
 - c. Required: Makes this field required for form users to successfully submit.
 - d. Inline help: Appears to form users as small grey help text beneath the field.
 - e. Print Options:
 - Page Break Before Element: Insert a page break before this field.
 - Display on alternate/signature page: Places this field on a separate page, often coupled with a signature field element

4) Form Business Logic (Set Conditional Fields)

- While still in the pop-up window, set rules for when a field will be viewable to the applicant/reviewer. In the “Show If” section, select the field to base condition from.
- Then select the condition and value to apply to the field.
- When finished, select the checkbox to add the condition.

The first screenshot shows the 'Related Field' dropdown set to 'Is this a capital pro.' and the 'Condition' dropdown set to 'is'. The 'Value' dropdown is set to 'unset'. A dropdown menu is open below the 'Related Field' dropdown, showing 'Is this a capital project? (ff-052321)' and 'Table Upload (ff-052244)'. The second screenshot shows the 'Condition' dropdown menu open, with options 'is', 'isn't', 'exists', and 'does not exist'. The third screenshot shows the 'Value' dropdown menu open, with options 'Yes' and 'No'. The fourth screenshot shows the 'Value' dropdown set to 'Yes' and a red box around a green checkmark icon, with an 'Add' button below it.

- If additional rules are needed, select the “and/or” logic between multiple rules.

The screenshot shows a dropdown menu for 'And/Or' logic, with 'and' selected. To the right, a 'Related Field' dropdown is partially visible, showing 'Table Up'.

NOTE: Conditional fields work best when the “Related Field” is one of the following field types: Radio Button, Number Input or Dropdown.

- 5) Edit Total Score: Review Forms come with a calculated “Total Score” that displays to Reviewers at the bottom of the form. This will also appear in the table of submitted review responses.
 - When editing a Number field (or a Dropdown or Radio Button elements that has a numerical value as a response) that will be included in the Total Score, check the box labeled *Include in Total Score*.
 - Include a minimum and maximum value for this field.

- c. When reviewers fill out the form, they will see the Total Score displayed as a fraction of the total possible points. The total possible points will be a sum of the maximum values of all included numerical fields. This can be tested in the “Preview” mode while editing.

- 7) Duplicate Fields: To duplicate a form field, select the copy icon, and then select the grey paste icon (at the top of the form), to add the copied field.

- 8) Delete Fields: Select the trash can icon.

- 9) Move Fields: Select the grid icon and drag the field to another location.

Save and Preview Form

As a form is being edited, users can preview what the form will look like to those completing it.

- 1) While editing the form, select the *Save* button.

The screenshot shows the 'Form Layout' editor interface. At the top, there are two tabs: 'SETUP FORM' and 'PREVIEW FORM'. Below the tabs, it says 'Last edited by: Brittany Murtaugh, undefined'. The main area is titled 'Form Layout' and contains 'FORM META SETTINGS & INFO'. This section includes fields for 'Form Name' (Core Information), 'Form ID' (afm-000967), 'Program Name' (Non-Competitive (Direct to Award) Subaward Justification Waiver), and 'Submission Stage' (Non-Competitive (Direct to Award) Subaward Justification Waiver Request). On the right side, there is a 'Form Elements Toolbox' with categories: LAYOUT, TYPOGRAPHY, CONTROLS, and UPLOAD/DOWNLOAD. At the top right of the editor, there are two buttons: 'SAVE' (highlighted with a red box) and 'CANCEL'.

- 2) At the top of the page, select *Preview*.

This screenshot is similar to the previous one, showing the 'Form Layout' editor. The 'PREVIEW FORM' tab is now highlighted with a red box. The 'SAVE' and 'CANCEL' buttons are still visible at the top right.

- 3) This will toggle to the Preview of the form being build. This will be exactly how the applicant will view the form. Conditional fields can also be tested here. Use the *Test Form* button to simulate a submission of the form.

The screenshot shows the 'Preview Form' view. At the top, there are two tabs: 'SETUP FORM' and 'PREVIEW FORM'. Below the tabs, it says 'You can test your form, fill it with content, see if business logic works, etc. Anything you input will be not saved in reality, this is only for the master form testing.' The main area is titled 'Instructions' and contains the text: 'Fill out Core Information Form: Project Title should be the name of your proposed solicitation and Organization Name should be your State Agency. Full waiver request form in next section.' Below this, there are several input fields: 'Application' (with a dropdown menu showing 'Status' and '[.]'), 'Project Title' (with a red asterisk), 'Organization Name' (with a red asterisk), 'First Name' (with a red asterisk), 'Last Name' (with a red asterisk), and 'Email' (with a red asterisk). At the top right of the preview area, there are two buttons: 'TEST FORM' (highlighted with a red box) and 'RESET'.

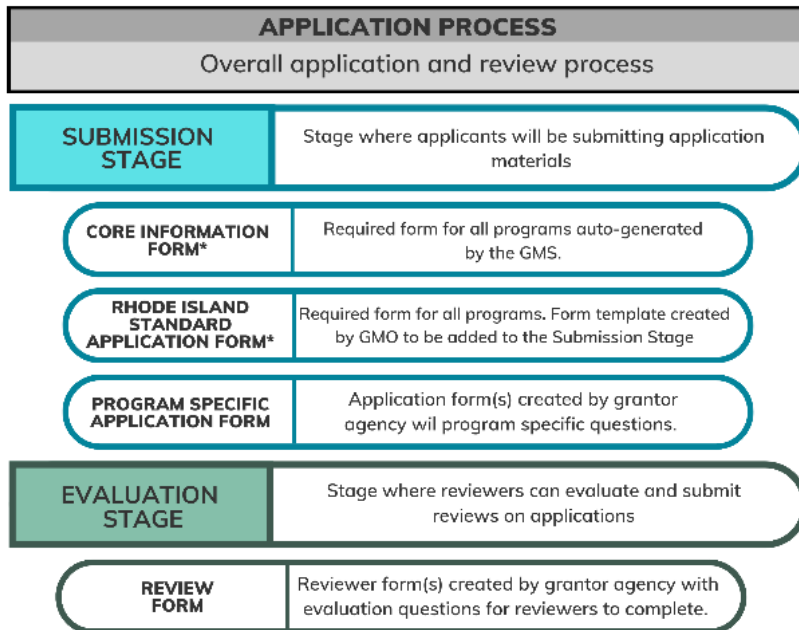
- 4) To continue editing, select *Edit Form* at the top of the page.

Appendix F: Templates+

Template Introduction

The Template functionality in ARM allows grantor agencies to standardize programs and save time by creating templates for all components of an application process.

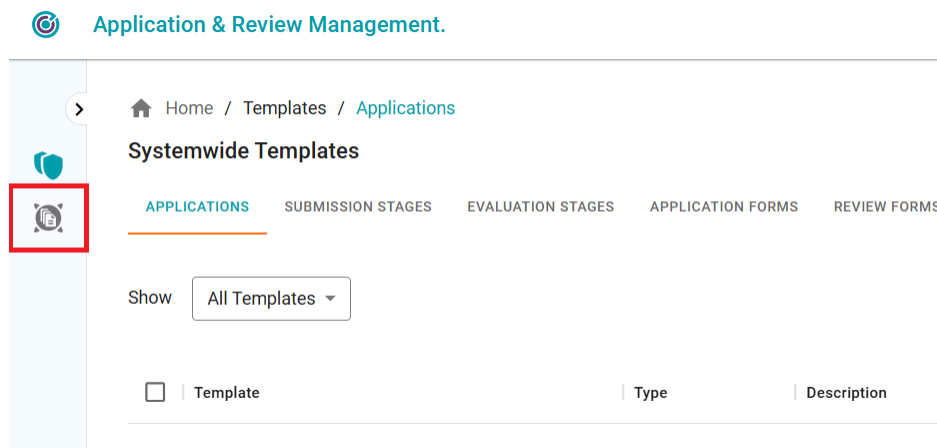
- 1) Application Process
- 2) Submission Stage
- 3) Evaluation Stage
- 4) Application Forms
- 5) Review Forms



By creating templates, users can re-use the same program set up year to year for re-occurring programs without having to start from scratch each year.

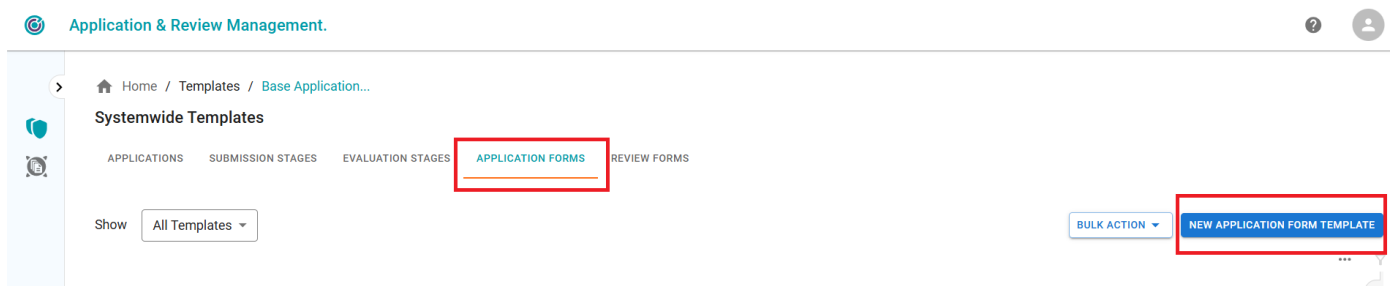
Creating Templates

- 1) Once in ARM, select the Template icon on the lefthand side of the screen.

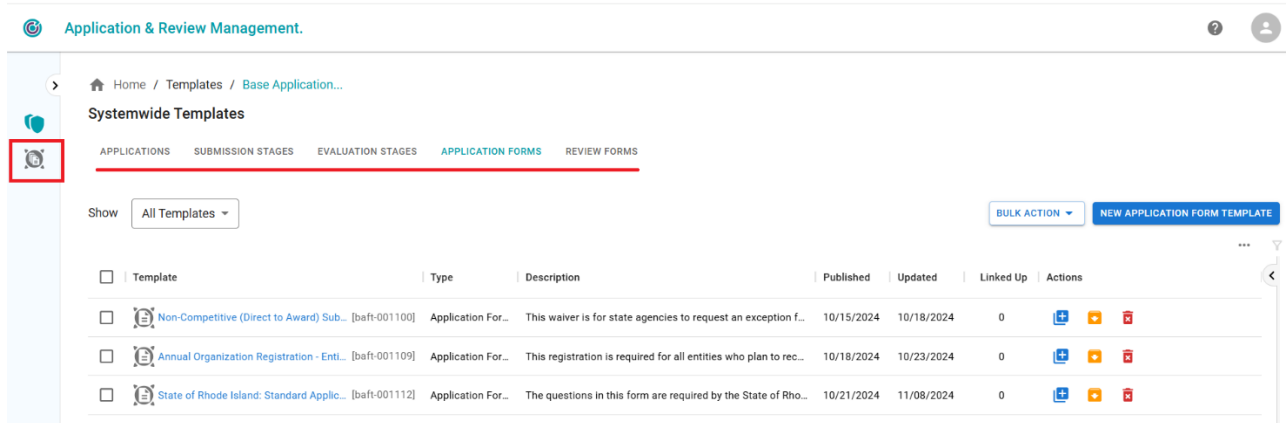


- 2) The column headers at the top of the page will provide the options of what type of template is being created. Chose the template type by selecting *Applications*, *Submission Stages*, *Evaluation Stages*,

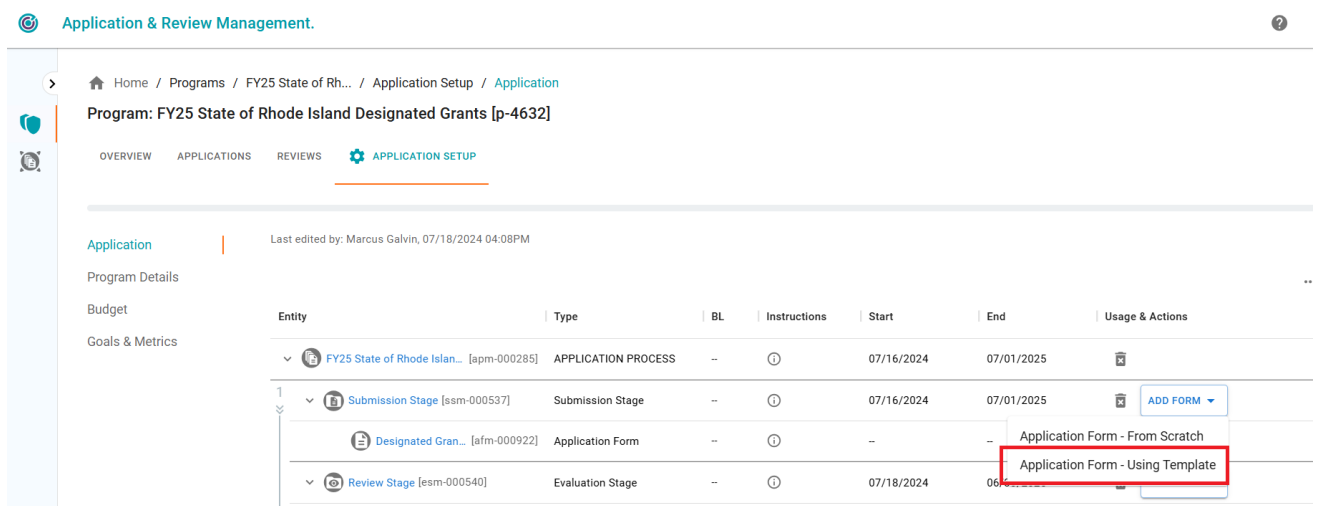
Application Forms, or *Review Forms*. Once the correct heading is selected, then select the blue button to create the template. In this example, a new Application Form Template is being created.



- 3) Follow the steps to build the template as outlined in the [Phase 4](#) and save once complete.
- 4) All new templates created will be found under the Template tab, categorized by the type of template that it is (Submission Stage, Application Form etc.). All previously completed templates will be viewable here as well.
- 5) Once a template is created, it can be used while building the application. When given the option to



“Using Template” or “Start From Scratch” in [Phase 4](#), select *Using Template*.



- 6) A pop up will appear, select the appropriate template, and select *Apply Template*.

Base Application Form Templates

Pick a template to be used for setting up your Application Form.

By applying the template the entire structure will be pre-populated. Once applied you can edit and customize the way you need it.

Submitter	Template ID	Template Title	Description	Published	Updated
<input checked="" type="radio"/> Brittany Murtaugh	[baft-001100]	Non-Competitive (Direct to Award) Su	This waiver is for state agencies L...	10/15/2024	10/18/2024
<input type="radio"/> Brittany Murtaugh	[baft-001109]	Annual Organization Registration - En	This registration is required for all...	10/18/2024	10/23/2024
<input type="radio"/> Brittany Murtaugh	[baft-001112]	State of Rhode Island: Standard Appli	The questions in this form are req...	10/21/2024	11/08/2024

1-3 of 3

NOTE: Only Application Form templates will appear if adding an Application Form. Only Review Stage templates will appear if trying to add a Review Stage etc.

- 7) That template has now been added to the Application Process for this program. Continue to add additional templates if needed.

Managing Templates

- 1) To archive, unarchive, or delete Templates, select the desired Templates from the table and open the Bulk Action menu button to select the desired action.

Show: All Templates

BULK ACTION

- Archive Selected
- Unarchive Selected
- Delete Selected

Template	Type	Description	Published
<input type="checkbox"/> Intent to Apply (Training 2) [baft-000677]	Ap...	This is our standard intent to apply form...	01/31
<input checked="" type="checkbox"/> Project Detail Submission (Training 2) [baft-000678]	Ap...	This is...	01/31

- 2) Select the *Show* dropdown to pick which Templates will show in the table. Select *Active Only* or *Archived Only* to narrow the results.

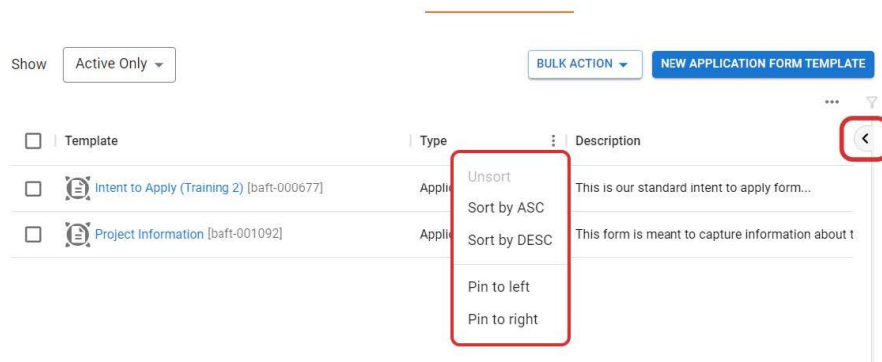
Show: All Templates

BULK ACTION

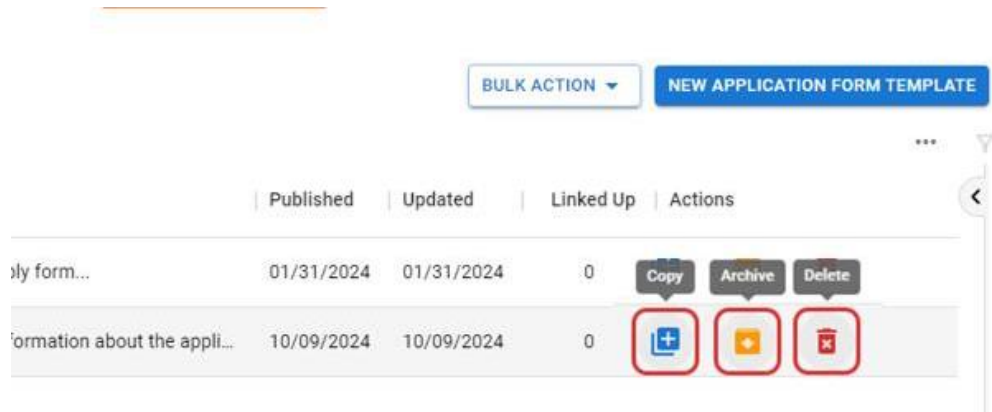
- All Templates
- Active Only
- Archived Only

Template	Type	Description	Published
<input type="checkbox"/> Intent to Apply (Training 2) [baft-000677]	Ap...	This is our standard intent to apply form...	01/31
<input type="checkbox"/> Project Detail Submission (Training 2) [baft-000678]	Ap...	This is...	01/31
<input type="checkbox"/> Project Information [baft-001092]	Ap...	This form is meant to capture information about the appli...	10/09
<input type="checkbox"/> Intent To Apply [baft-000563]	Ap...	This form would be used to deploy an intent to apply befor...	01/17

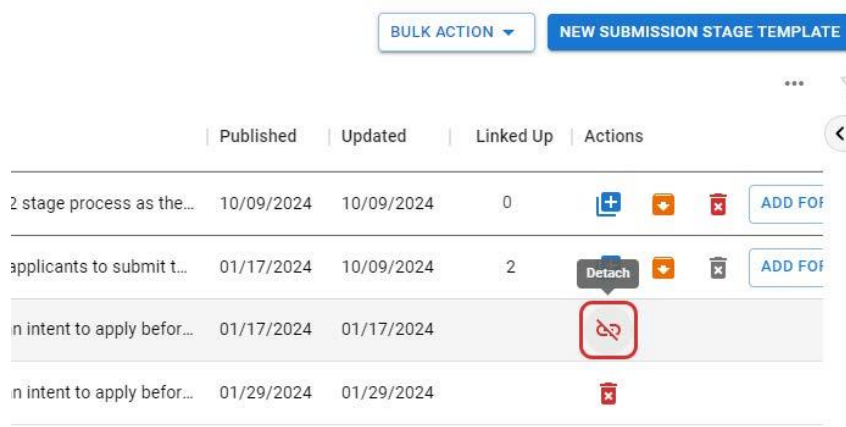
- For further sorting and filtering, select the three vertical dots above any column or expand the right-hand filter bar by selecting the caret on the top-right corner of the table



- To copy, archive, or delete a Template, select from the buttons underneath the Actions column (the right-most column).



- To remove a linked Template Form from a Template Stage by select *Detach* from the Actions column.



- To view where and how this Template is being used across Programs, select the “Usage” heading at the top of the template. On top of displaying which user created it or made the last edits, the page shows where this template is “linked” and “applied”.
 - Linked: Form Templates can be linked to a Stage Template. This allows both a Stage Template and its Forms to be copied into a program all at once.

- b. Applied: Users “apply” a Form Template to an individual Program when building out its stages and forms

Application Form **Template** : Intent To Apply [baft-000563]

SETUP FORM PREVIEW FORM **USAGE**


Nr of Stage Templates linked to: 2

Created by: Anthony Torres

Applied in setup directly: 2 times

Last Edited By: Anthony Torres

LINKED TO APPLIED TO

Timestamp	User	Entity	Description
01/17/2024	Anthony Torres	 Intent to Apply ... [sst-000289]	This template has fdsafdsaa sing...

NOTE: Templates can be edited/updated. Once a template is added to an Application Process, changes made to the original template will not impact the application being build.

Appendix G: Review Form Templates

The Grants Management Office has created three Review Form Templates for agencies to utilize in their application review process. See below for information on what is included in each Review Form.

NOTE: Agencies can select one of these templates and make additional edits to fit the needs of their program.

Application Review Form (Scored)




This Review Form Template provides agencies with a basic Review Form with a built-in numerical scoring template, along with other suggested prompts. Agencies can edit this template AFTER it is added to the Evaluation Stage of the program.

Application Review Form (Unscored)

This Review Form Template provides agencies with a Review Form that is unscored and relies primarily on written feedback, although other suggested prompts are also included. Agencies can edit this template AFTER it is added to the Evaluation Stage of the program.

Application Review Form (Streamlined – Unscored)

This Review Form Template provides agencies with a streamlined Review Form that is unscored and only required reviewers to document review recommendations, although other suggested prompts are also included. Agencies can edit this template AFTER it is added to the Evaluation Stage of the program.

 Application Review Form (Unscored) [brft-001565]	Review Form
 Application Review Form (Scored) [brft-001564]	Review Form
 Application Review Form (Streamlined - ... [brft-001581]	Review Form

Appendix H: Status Definitions

The table below outlines the status' of an application from the grantor perspective during the award recommendation process.

Award Recommendation Status'

The table below outlines the potential status' part of the Award Recommendation process, who the next step needs to be taken by, and the definition of the status.

Recommendation Status	Needs action by:	Definition
Pending Subrecipient Response (Direct)	Subrecipient	The Direct Award initiation has been sent. The subrecipient needs to accept the invite using the link in the email invitation.
Recommendation Pending	State Agency	The state agency has moved the application from "Under Review" to "Recommend Award" in the application workspace and can now create the Award Recommendation package.
Recommendation Pending (Direct)	State Agency	The subrecipient has accepted the Direct Award invitation and the state agency can now create the Award Recommendation package.
Pending Recommendation Approval	State Agency	The Award Recommendation package has been created by a state agency user and sent for approval. The state agency user(s) in the Recommendation Approval workflow need to review the Award Recommendation package.
Changes Requested	State Agency	State agency user(s) in the Recommendation Approval workflow have sent the Award Recommendation package back for changes. The state agency user should make the requested edits to the Award Recommendation package before re-sending it for approval.
Pending Acceptance	Subrecipient	The Award Recommendation package has been approved and sent to the subrecipient. The subrecipient needs to review the award package and accept/request changes/decline the award. Prior to accepting, the subrecipient must download, sign and upload the subaward agreement.
Subrecipient Changes Requested	State Agency	The subrecipient has requested changes to their Budget and/or Goals section of their award package. The state agency user must review and approve any changes before sending the Award Recommendation package back into the Recommendation Approval workflow. If applicable, be sure the subaward agreement is revised to align with changes in the GMS.
Pending Final Approval	State Agency	The subrecipient has accepted their award and is pending finalization. The state agency user(s) in the Final Approval workflow need to review the award package and files uploaded by the subrecipient to ensure the signed subaward agreement is attached. Prior to final approval, a state agency user must upload the fully executed subaward agreement. Note: The state agency signatory on subaward agreement does <u>not</u> need to be an Euna/eCivis user.
Pending Subrecipient Changes	Subrecipient	During the Final Approval workflow, the state agency user(s) returned the award package back to the subrecipient for changes (budget, goals, upload files, etc.). The subrecipient needs to address the changes requested before re-accepting the award.
Declined by Grantor	N/A	The state agency user(s) declined the award and notified the subrecipient that they will not be awarded. If needed, the Award Recommendation package can be re-opened by a state agency user.
Declined by Subrecipient	N/A	The subrecipient declined the award during the award acceptance process. If needed, the Award Recommendation package can be re-opened by a state agency user.

Appendix I: Example Auto-Generated Emails

Award Notification Letter: Sent to the applicant in their award package if a replacement file is not uploaded by the state agency.

Award Notification Letter

Dear Katje Benoit,

Congratulations! This is to inform you that your application is now awarded.

Project: Competitive Award Acceptance

Program: Chamber of Commerce Program

Notification Date:

Approval Date: 12/12/2022

Approved Amount: \$900.00

Federal Awards:

- US17538 American Rescue Plan Act Economic Adjustment Assistance (ARPA EAA) - FY 2021: \$450.00
 - Agency: U.S. Department of Commerce
 - Fiscal Year: 2021
 - CFDA: 11.307

Total Federal: \$450.00

Other Awards:

- Demo General Fund FY2022: \$450.00

Total Other: \$450.00

Total Match: \$0.00

Period of Performance: 12/01/2022 - 12/31/2024

Award/Contract Number: COCP-FY23-0001

Ein: 12-3456789

Direct Award Invitation: Sent to the Direct Award subrecipient as part of the “Initiating Direct Award” process. The subrecipient must select the hyperlinked “Initiate Direct Award” in the email to accept the invitation and move forward.



We are pleased to inform you that a direct award has been initiated for the following program:

Grantor: Rhode Island- DEMO

Program Name: Chamber of Commerce Program

Project Title: Direct Award Acceptance

Note from grantor:

Congratulations! You have been awarded funding from the state of Rhode Island! Please log into your eCivis Portal to accept your award.

To complete the award initiation please use the following link. If you already have an eCivis Portal account you may use that to sign in, or you will be able to create a free account to manage this award:

[Initiate Direct Award \(mandrillapp.com\)](#)

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

Sincerely,

Test

Award Recommendation Approval Task Notification: Sent to the state agency user(s) that are part of the Award Recommendation Approval Workflow. This is a notification that they have a pending award recommendation that needs their approval.



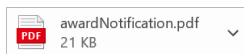
An approval task has been created that requires your attention in eCivis Grants Network.

Program: Direct Award Test2
Project: Planting Trees 2023
Award/Contract Number: RI-23-0001
Subrecipient: Katje's Organization
Task Type: Award Recommendation Approval
Approval Type: Single User
Review Comment: Award Rec created on 12/29. Subaward agreement attached and ready for signature by subrecipient.

Sincerely,

The eCivis Support Team

Award Denial: Sent to the applicant if during the Award Recommendation or Final Award Approval process the task is rejected or denied.



We're sorry to inform you that your application has been denied for the following program:

Title: Direct Award Test2

Your application details will remain available in the [eCivis Portal \[mandrillapp.com\]](#).

This application will not be processed any further within the system but will remain on record. Please refer to the note from the grantor below for further information about your application or additional opportunities.

Tentative Award Notification: Sent to the applicant once an award package has been approved by all approvers in the Award Recommendation workflow.

Award Notification Letter

Dear Katje Benoit,

Congratulations! An award package has been created for the following program:

Project: Planting Trees 2023
Program: Direct Award Test2
Approved Amount: \$2,000.00
Other Awards:

- Excise tax: \$2,000.00

Total Other: \$2,000.00
Total Match: \$0.00
Period of Performance: 01/01/2023 - 12/31/2023
Award/Contract Number: RI-23-0001
Ein: 12-3456789

Note from grantor:

Congratulations! You have been awarded funding from the Rhode Island Department of Administration! Please log in to your eCivis Portal account to review and sign your subaward agreement and accept your award.

Please find your award letter attached. To see full award details and accept your award, please click [here \[portal.ecivis.com\]](#).

For any questions pertaining to this award package, please contact your grantor at: katje.benoit_ctr@omb.ri.gov

Final Approval Task Notification: Sent to the state agency user(s) that are part of the Final Approval workflow. This is a notification that they have a pending Final Award Approval that needs their approval.



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

Program: Direct Award Test2
Project: Planting Trees 2023
Award/Contract Number: RI-23-0001
Subrecipient: Katje's Organization
Task Type: Final Award Approval
Approval Type: Single User
Review Comment:

Sincerely,

The eCivis Support Team

Grant Award Notification: Sent to the subrecipient once all members of the Final Approval workflow have reviewed and approved the award.



We are pleased to inform you that your award has been approved for the following program:

Program: Direct Award Test2

Project: Goals Test

You can now manage your post-award activities in the [eCivis Portal \[mandrillapp.com\]](https://mandrillapp.com). This will include submitting financial and activity reports, award amendments, and miscellaneous tasks.

Note from grantor:

Test

For any questions pertaining to this award package, please contact your grantor at:

katje.benoit_ctr@omb.ri.gov

Appendix J: Recommended Stage/Form Names and Instructions

Below are recommendations on what to title the various stages and forms as well as recommended text for the instructions of the stages and forms. Additionally, recommendations on how to format the Core Information Form are provided as well.

Recommended Stage/Form Names and Instructions

Submission Stage

- Recommended Name: [Name of program] Submission Stage
- Recommended instructions: “All Application Forms within this Submission Stage must be completed before application can be submitted. Refer to the instructions within each form for additional information.”

Settings

APPLICATION PROCESS META SETTINGS & INFO ^

Stage Name *

Grantor Training Program Submission Stage

Stage ID

ssm-000772

Program Name

Grantor Training Test Program 2025

Program ID

5065

Instructions *

All Application Forms within this Submission Stage must be completed before application can be submitted. Refer to the instructions within each form for additional information.

Start Date

11/19/2024 04:00 PM

End Date

03/29/2025 11:59 AM

Core Information Form

The Core Information Form is an auto-generated required form part of the Submission Stage. However, the Core Information Form can be edited. See recommendation of how best to utilize the Core Information Form to ensure efficiency and avoid redundancy for applications.

Application Form (Program specific)

- Recommended Name: [Name of Program]: Program Questions
- Recommended Instructions: “This form contains program specific questions generated by [Insert agency name]. Responses to questions in this form will determine if the application will be awarded. For any questions about the contents of this form, please refer to the Contact tab on the Solicitation.” [Insert additional instructions if needed]

Form Layout

FORM META SETTINGS & INFO ^

Form Name *

Grantor Test Program: Programmatic Questions

Form ID *

afm-001256

Program Name

Grantor Training Test Program 2025

Submission Stage

Grantor Training Program Submission Stage

Form Instructions *

This form contains program specific questions generated by the Grants Management Office. Responses to questions in this form will determine if the application will be awarded. For any questions about the contents of this form, please email doa.grants@doa.ri.gov

Evaluation Stage

- Recommended Name: [Name of program]: Evaluation Stage
- Recommended Instructions: “All Review Forms within this Evaluation Stage must be completed before the review can be submitted. Refer to the instructions within each form (if applicable) for additional information.”

The screenshot shows a 'Settings' form titled 'APPLICATION PROCESS META SETTINGS & INFO'. It contains the following fields:

Settings	
Stage Name *	Stage ID
Grantor Training Test Program: Evaluation Stage	esm-000773
Program Name	Program ID
Grantor Training Test Program 2025	5065
Instructions *	
All Review Forms within this Evaluation Stage must be completed before the review can be submitted. Refer to the instructions within each form (if applicable) for additional information.	
Start Date	End Date
06/05/2025 11:59 AM	06/30/2025 11:00 AM

Review Form

For Review Forms, see [Appendix G](#) to select a Review Form Template. If agency chooses to not use a Review Form Template, alternative text suggestions are below.

- Review Form Name: [Name of program] Application Review Form (followed by “Committee” or “Staff” if the program uses multiple review forms)
- Review Form Instructions: “This form contains review questions to evaluate the applications assigned to you. For questions about completing the Review Form, email [insert email].”
[Insert additional instructions if needed]

The screenshot shows a 'Form Layout' form titled 'FORM META SETTINGS & INFO'. It contains the following fields:

Form Layout	
Form Name *	Form ID *
Grantor Training Program Application Review Form	rfr-001257
Program Name	Evaluation Stage
Grantor Training Test Program 2025	Grantor Training Test Program: Evaluation Stage
Form Instructions *	
This form contains review questions to evaluate the applications assigned to you. F	

Recommended Text

- Recommended Name: Leave as “Core Information”
- Recommended Instructions: “The Core Information Form is a required, system-generated form that collects fundamental information about the applicant. For questions regarding the content of the Core Information Form, please submit a User Support Form: <https://controller.admin.ri.gov/grants-management/user-support>.”

NOTE: Each individual application will require the applicant to fill out a new Core Information Form.

Form Layout

FORM META SETTINGS & INFO ^

Form Name ★
Core Information

Form ID ★
afm-001254

Program Name
Grantor Training Test Program 2025

Submission Stage
Grantor Training Program Submission Stage

Form Instructions ★
The Core Information Form is a required system generated form that contains fundamental information about the applicant. For questions regarding the content of the Core Information Form, please submit a User Support Form: <https://controller.admin.ri.gov/grants-management/user-support>.

Recommended Form Setup

All fields in the Core Information Form can be deleted/edited except for the “Project Title” and “Organization Name” fields. These will be the fields that transfer over to Grants Network to populate the subrecipient award if awarded. Additionally, the “Application” field will create an auto-generated reference number for the application that cannot be changed/edited. Below are the fields recommended to keep in the Core Information Form and their purpose.

- **Project Title:** Required field. Will populate as the Project Title in eCivis Grants Network in the Post-Award Phase.
- **Organization Name:** Required field. Will populate as the Organization Name in eCivis Grants Network in the Post-Award Phase.
- **First Name:** Creates connection between forms if in need of a data pull or other search functionality.
- **Last Name:** Creates connection between forms if in need of a data pull or other search functionality.
- **Email:** Creates connection between forms if in need of a data pull or other search functionality.

All other fields can be edited or deleted. The Rhode Island Standard Application Form Template and the custom program specific Application Form created by the agency will have all other information required. By minimizing the questions in the Core Information Form, it creates less burden for the applicant. Agencies have the choice on what they add/edit/delete from the Core Information Form, excluding the required fields mentioned above.

SETUP FORM PREVIEW FORM

You can test your form, fill it with content, see if business logic works, etc. Anything you input will be not saved in reality, this is only for the master form testing.

TEST FORM RESET

Instructions

The Core Information Form is a required system generated form that contains fundamental information about the applicant. For questions regarding the content of the Core Information Form, please submit a User Support Form: <https://controller.admin.ri.gov/grants-management/user-support>.

Application
Status []

Project Title ★

Organization Name ★

First Name

Last Name

Email Input

Appendix K: Glossary

Term	Definition
2 CFR 200	Uniform Grant Guidance
Application and Review Manager	Supplemental platform of Grants Network for creating/managing the application and review process for grantors.
Approval Workflow	A series of review and approval activities or tasks that must be completed to accomplish specific parts of the grant process. Example: Final Award Approval workflow, Financial Report (payment request) Approval workflow.
ARM	Application and Review Management
Assistance Listing Number (ALN)	Federal grant program identifier (Formally CFDA) (specific to the federal grant)
Competitive Program	Program where applications are required and entities are competing for an award.
Contractor	An entity that receives a contract as defined in Uniform Grant Guidance (2 CFR 200.23) for the purpose of obtaining goods and services for the non-federal entity's own use. A contractor is not a subrecipient.
Department	Departments built within Grants Network. A single State agency may have one or more Departments within Grants Network, often aligning with Divisions.
Department Master Account Holder (DMAH)	User role in eCivis Grants Network: Ability to create, view and edits projects; can create solicitations; create/modify user groups; has access to Annual Organization Registration submissions; Pull reports etc.
eCivis Portal	Platform that applicants and subrecipients use to apply for and manage their grant awards.
Federal Award Identification Number (FAIN)	Federal grant award identifier (specific to the individual award)
First come, First Served	Grant funds are awarded to eligible applicants/projects in the order completed applications are received, essentially meaning the first entities to apply will receive the grant funding until it runs out.
Funding Opportunity	Grant program accepting applications. Rhode Island uses this terms when publishing solicitations for subrecipients
Funding Source	A specific stream of money that is funding a solicitation. This can be federal, state, or other types of funds.
GMO	Grants Management Office
GMS	Grants Management System (AKA Euna/eCivis for Rhode Island)

Grantor	Entity administering grant funds
Grants Network	Main Euna/eCivis site (gn.ecivis.com)
Match	Cost Share, or requirement of some grant programs that requires the grantee to "match" certain aspects of the award (i.e. dollars)
Non-Competitive/Direct to Award	Program that does not require a competitive application process. This process requires a waiver through the Grants Management Office
Organizational Funding	Funding that was set up by the GMO (examples include: Match funding, Placeholder funding, funding from IAA-FF's).
Pass-Through Funding	Funding that was saved and assigned to a Project in GMS and marked available for pass-through.
Period of Performance	Date range that determines the length of the grant award, and when costs associated with that award can be incurred
Pre-Award Stage	Stage in the grant lifecycle before an entity is awarded grant funding
Receiver ID	Repurposed in GMS for Natural Account Code
Solicitation	The public-facing notification of available subaward funding, sometimes referred to as a notice of funding availability/opportunity. The setting up of a Solicitation in Grants Network creates the content that is public-facing and also the Program specific settings that are not public facing, such as approval workflows.
State Grant Regulation	Rules and Regulations for Grant-Making Involving Federal Funds (220-RICR-20-00-2)
Subaward Agreement	Contract issued by state agency to subrecipient. Standard subaward agreement and appendices required by State of Rhode Island. Required as part of the State Grant Regulation (220-RICR-20-00-2)
Subrecipient	Entities that receive subaward funding from RI State Agencies utilizing the GMS