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.

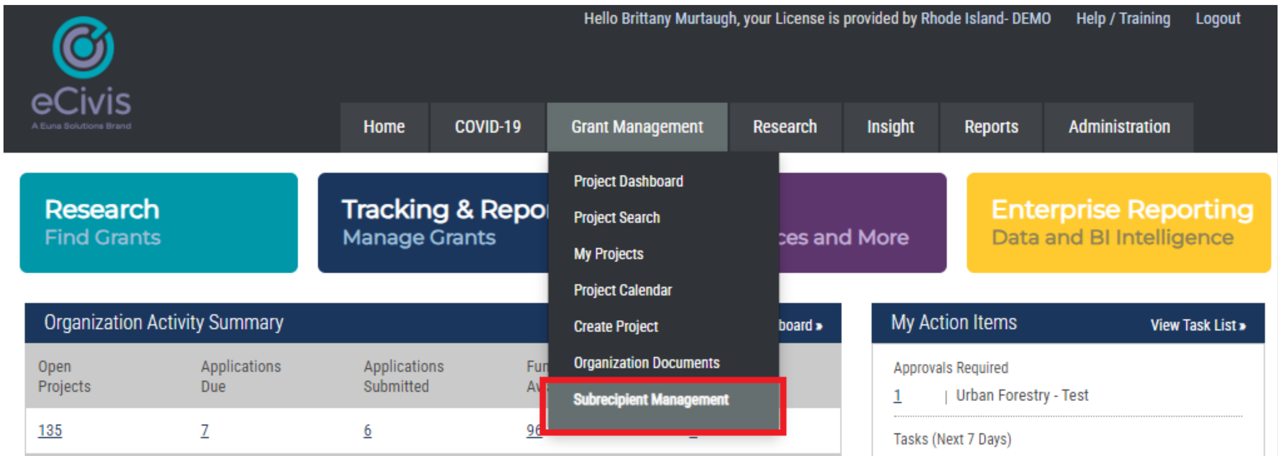
NOTE: See Appendix K for additional defined terminology.

Phase 1: Creating a New Program

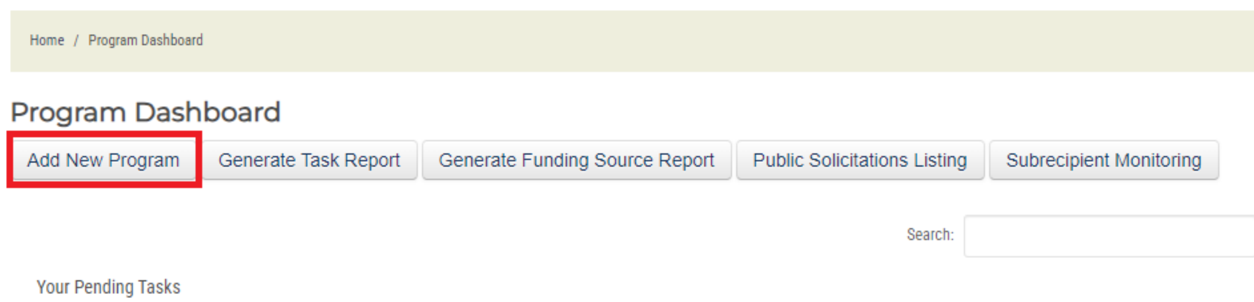
1.1. How to Create a New Program

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*.



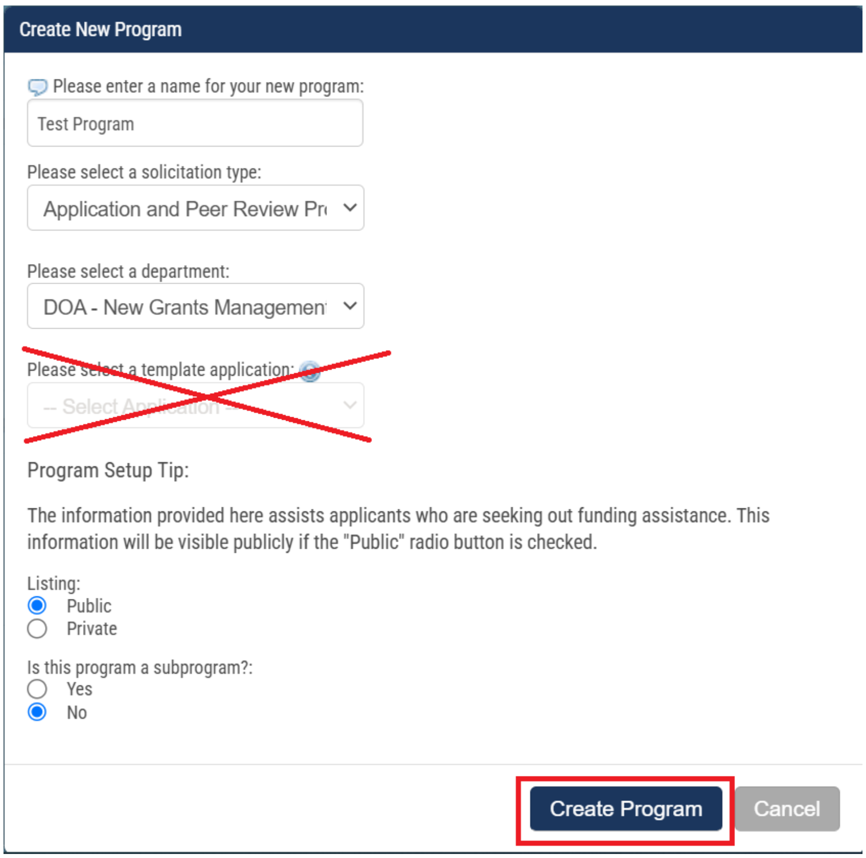
4) A pop-up window will appear. Fill out the information requested.
   a. Please enter a name for the program: Create a name for the program. This will be the name viewable to agency users, applicants, and future subrecipients. Ensure it is clear and recognizable to a wider audience. Additionally, if 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. <u>Please select a template application</u>: 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. <u>Listing</u>: 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. <u>Is this program a subprogram?</u>: Leave selection as is - functionality is not used by Rhode Island.

5) Once the information is complete, select *Create Program*.

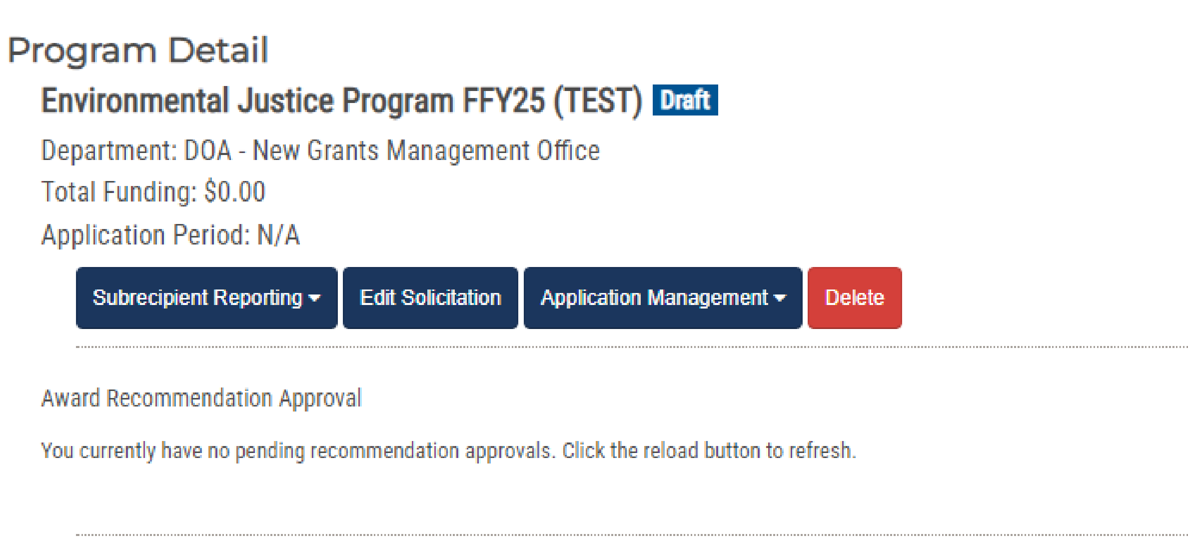


6) This will bring open the "Program Detail" page. See next section for overview.

<u>1.2. Program Detail Page Overview</u>

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.

- <u>Edit Solicitation</u>: This will be where the details of the program are entered.
- <u>Application Management</u>: This is where users will access the Application and Review Management (ARM) feature for competitive programs once the solicitation is complete.
- <u>Delete</u>: 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.

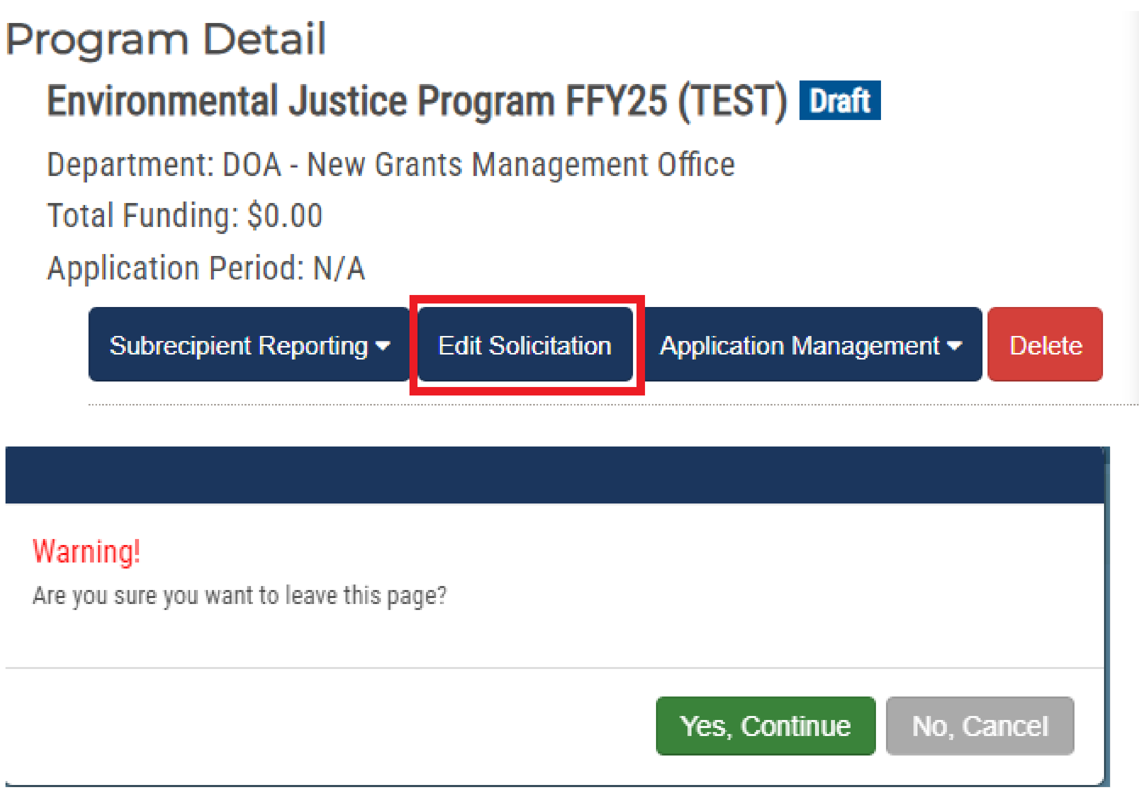


Phase 2: Editing the Solicitation

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*



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

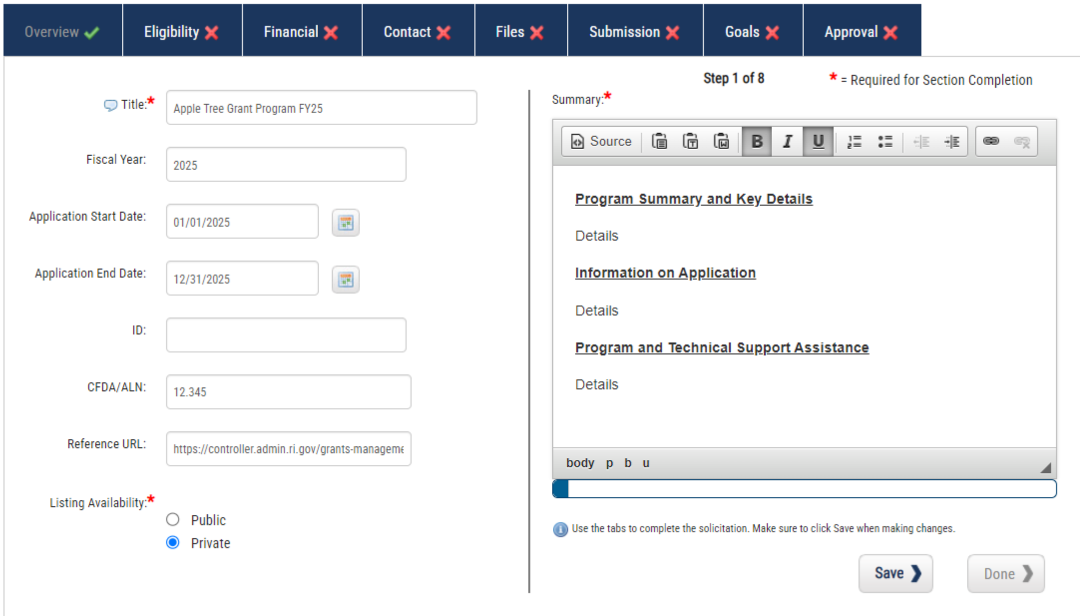
3) The first 5 tabs are public facing, while the last 4 tabs are internal only.
    a. Public: Overview, Eligibility, Financial, Contact, Files
        - Be sure to include all information for applications in these first 5 tabs.
    b. Internal: Review, Submission, Goals, Approval

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)

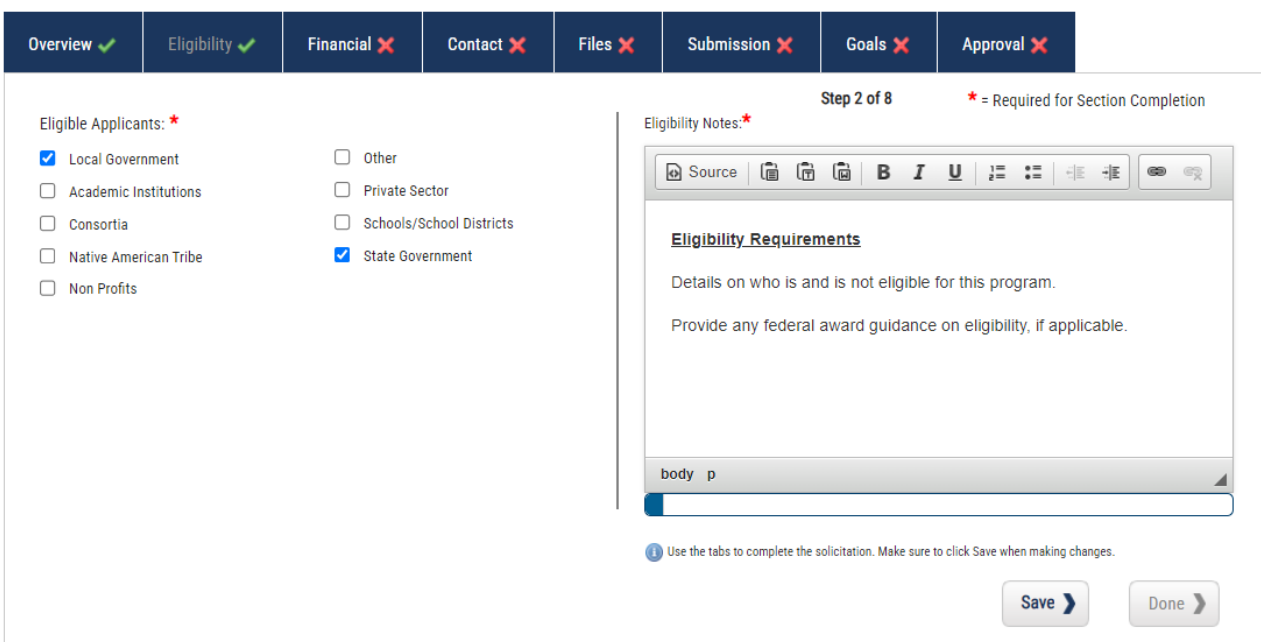
    NOTE: State regulation requires competitive and first come, first served programs be posted for a minimum of 21 consecutive calendar days.
3) Fiscal Year: Enter the grant/program/fiscal year of this funding cycle. (Optional field)
4) ID: Rhode Island does not utilize this field and it can be left blank.
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)



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)

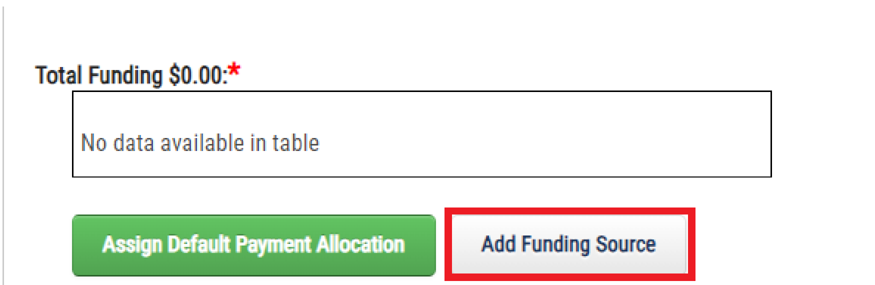


2.4. Edit Solicitation: Financial tab

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.

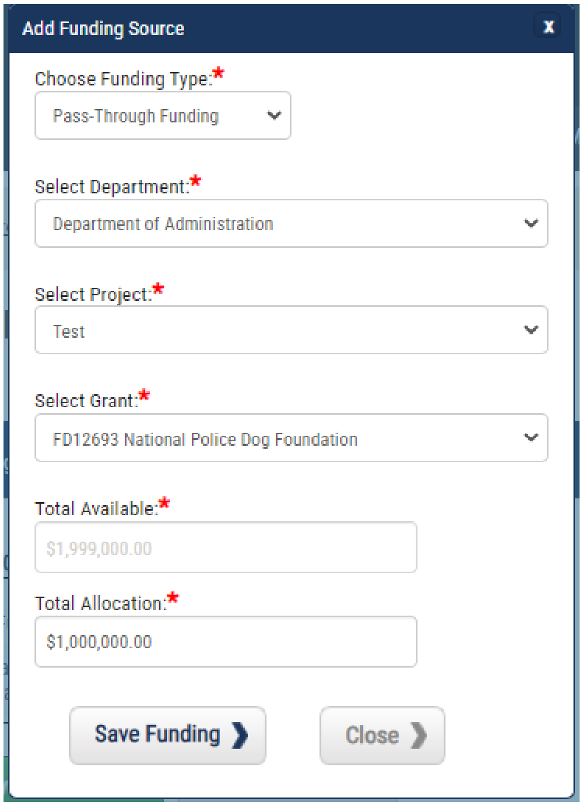
NOTE: Programs that must review applications before federal funds are received: Only one source of funds is required to publish a solicitation. If necessary, that source can be a temporary placeholder. Use the Support Form for assistance.)

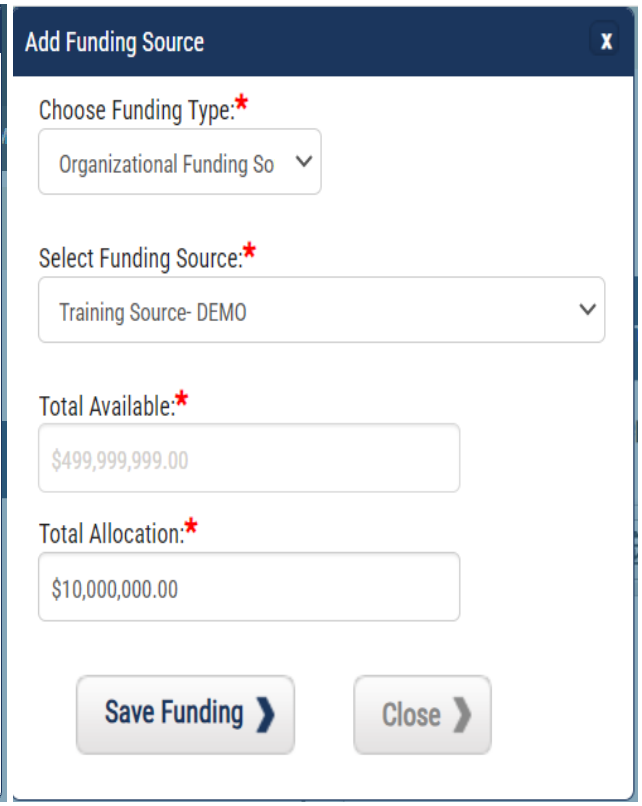
1) Total Funding: This section should hold the total funding that will fund the subaward programs for the entire award. If using multiple funding sources to fund this program, they all must be entered here before issuing any subawards. To add funding sources, see steps below. (Required field)
    a.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





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)

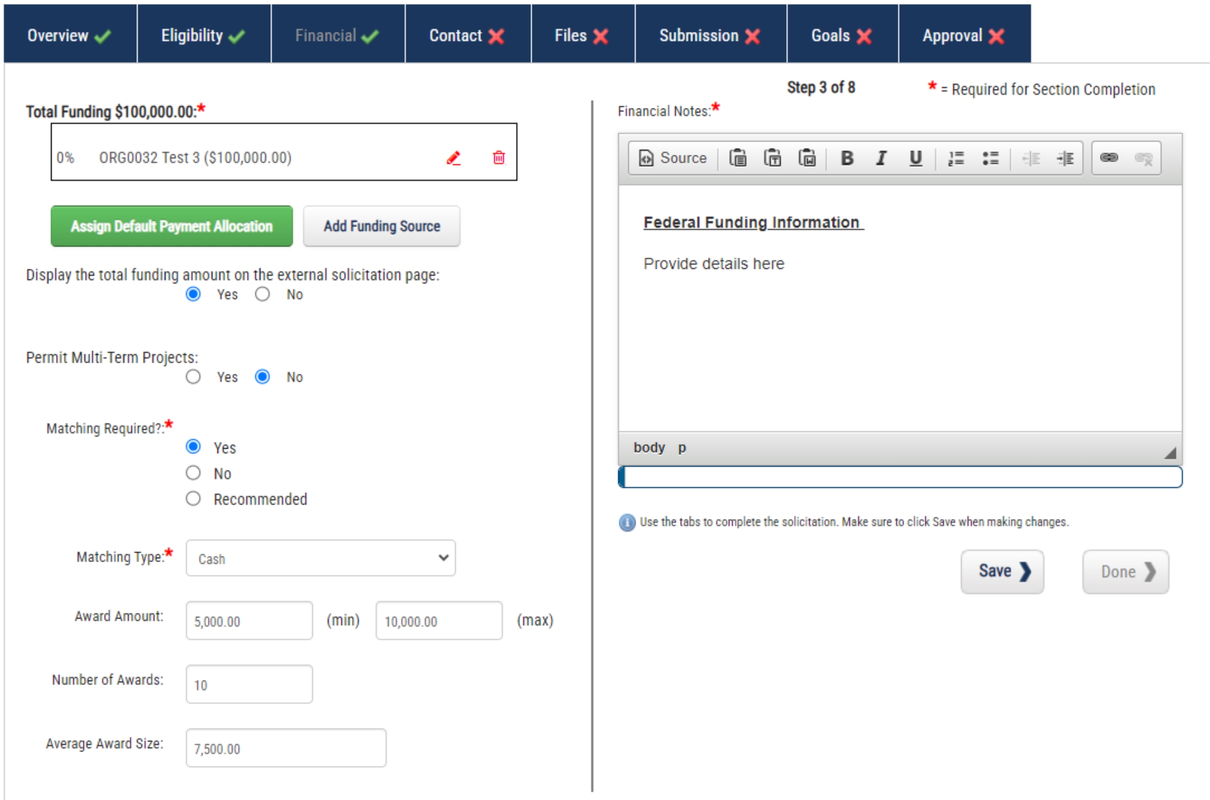
4) Matching Required?: Indicate whether applicants, if selected, will be required to provide match funds. (Required field)

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)

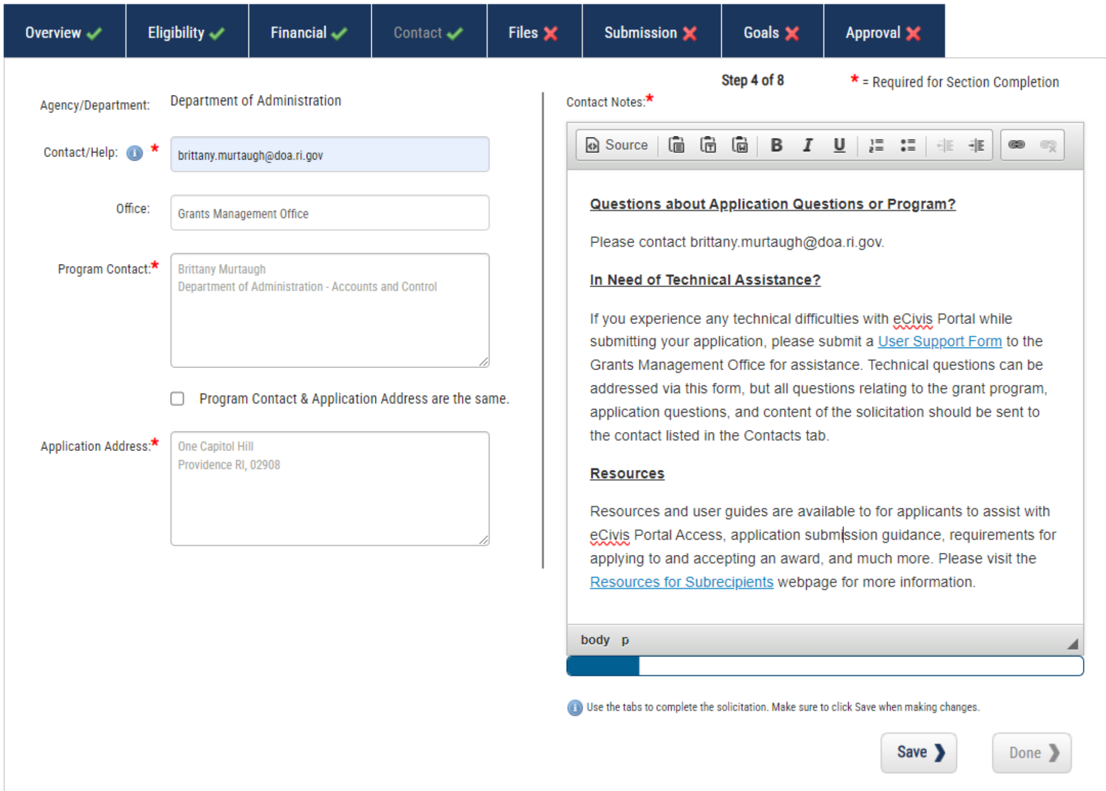
8) Financial Notes: Provide detailed information about the funding sources for this program, and any other financial related information relevant to applicants. (Required field)



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).

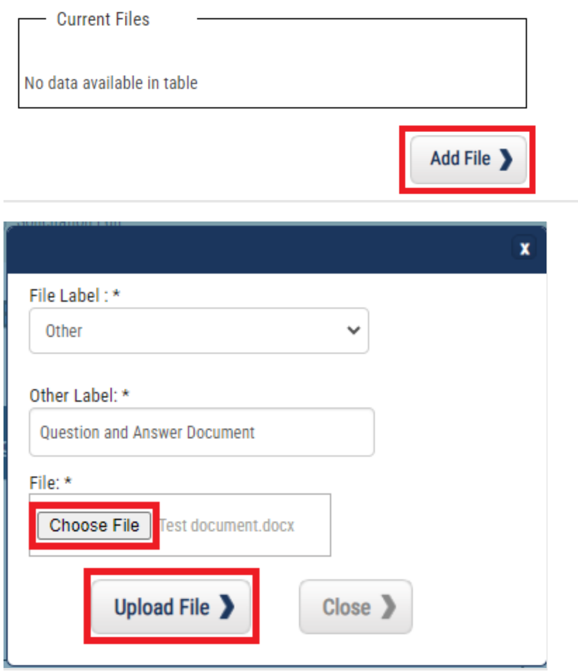
1) Contact/Help: This should be the email address applicants should reach out to with questions about the program. This may be an individual's email, or an office/program email. (Required field)
2) Office: Enter the name of the office or division within the agency. (Optional field)
3) Program Contact: 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.



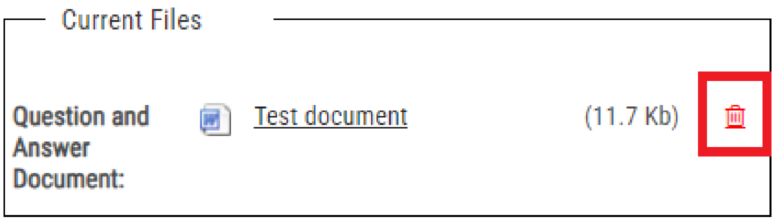
2.6. Edit Solicitation: Files tab

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

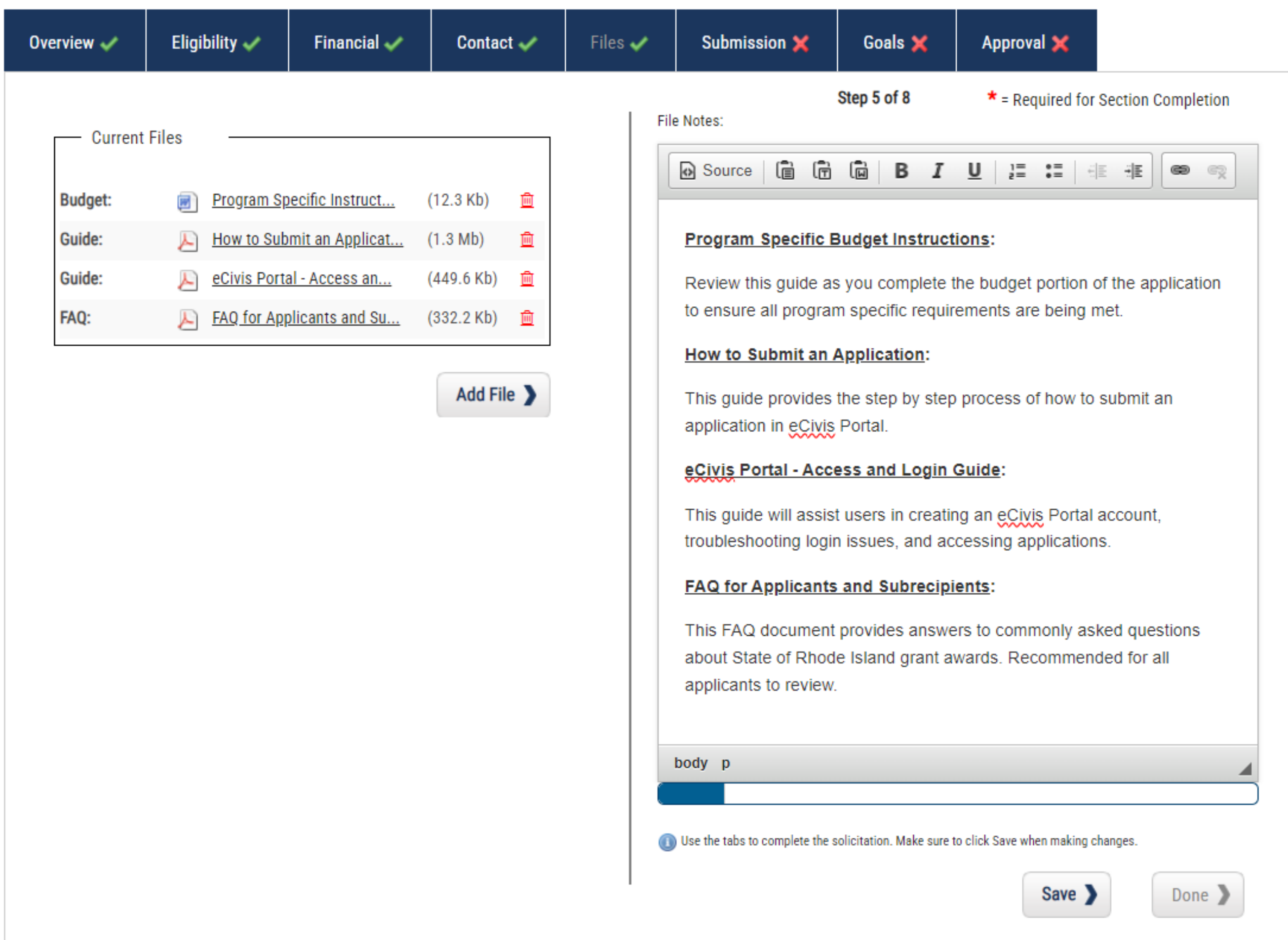
1) Current Files: List of files uploaded. See below for how to add files (Optional field)
    a. Select *Add File* to add a file to the solicitation.
    b. Chose a "File Label" (or create one) and select *Choose File* to choose a file from the computer.
    c. Once selected, select *Upload File* to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



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)



NOTE: See Appendix B for recommendations on files to add to the solicitation.

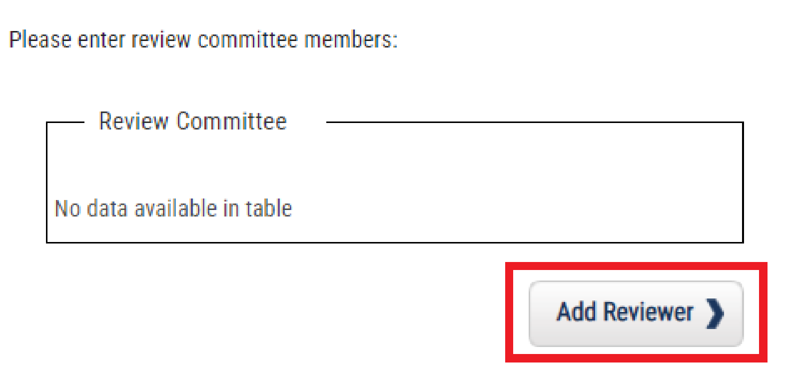
2.7. Edit Solicitation: Review tab

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.

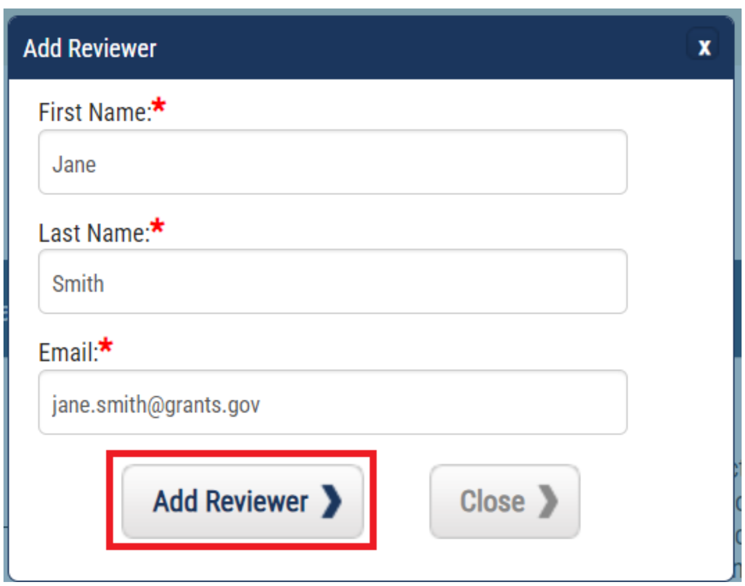
1) <u>Review Committee</u>: List of individuals reviewing applications. If it is unknown who will be on the review committee, this can be left blank and reviewers can be added at a later date. (Optional field*)

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.

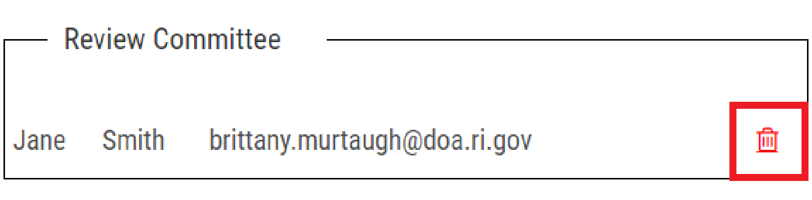
a. Select *Add Reviewer* to add the first member of the review committee.



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

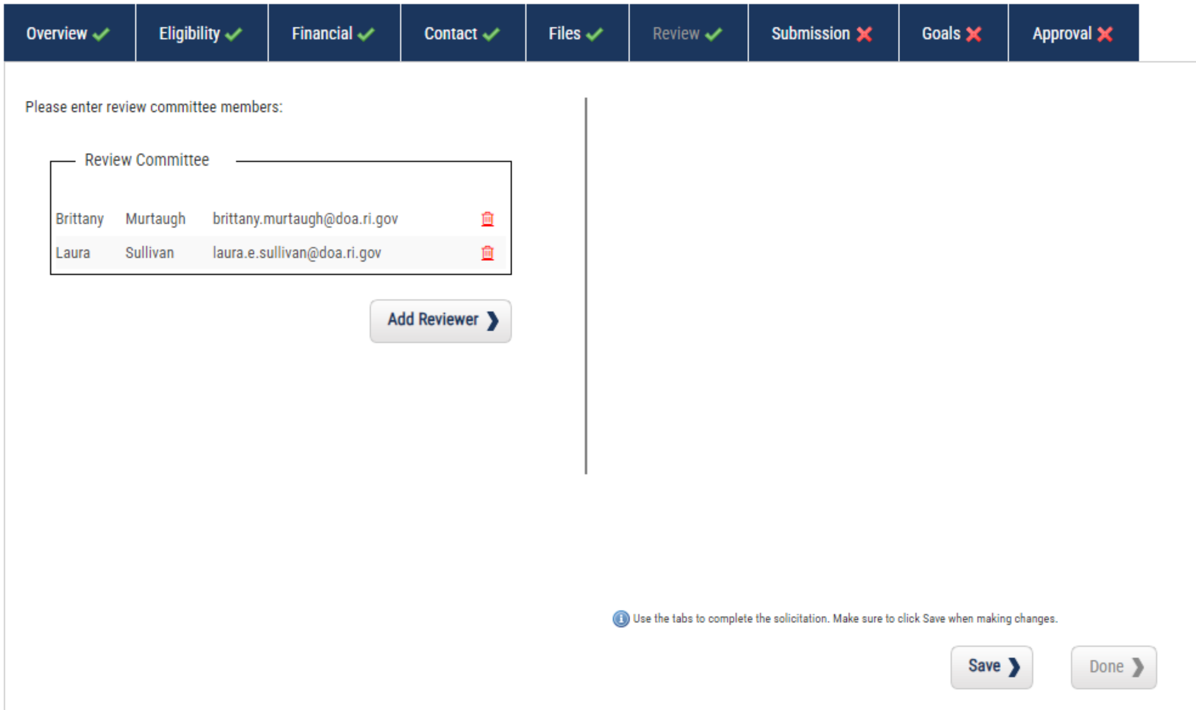


c. The reviewer will appear in the Review Committee list. Continue to add reviewers or use the red trashcan icon to remove a reviewer from the list.



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.



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.

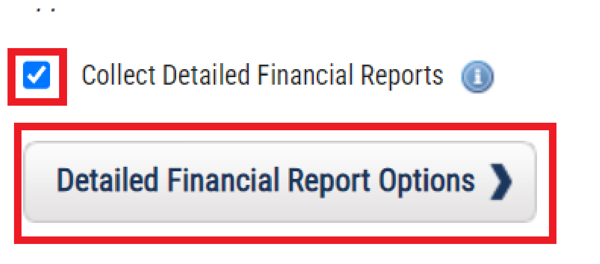
1) Accept Multiple Applications Per User: Select "Yes" for a singular user account to be able to submit multiple applications for this program. The ability/inability to submit multiple applications is checked against the applicant's email address, not organization. (Required field)
2) Budget Development: 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.

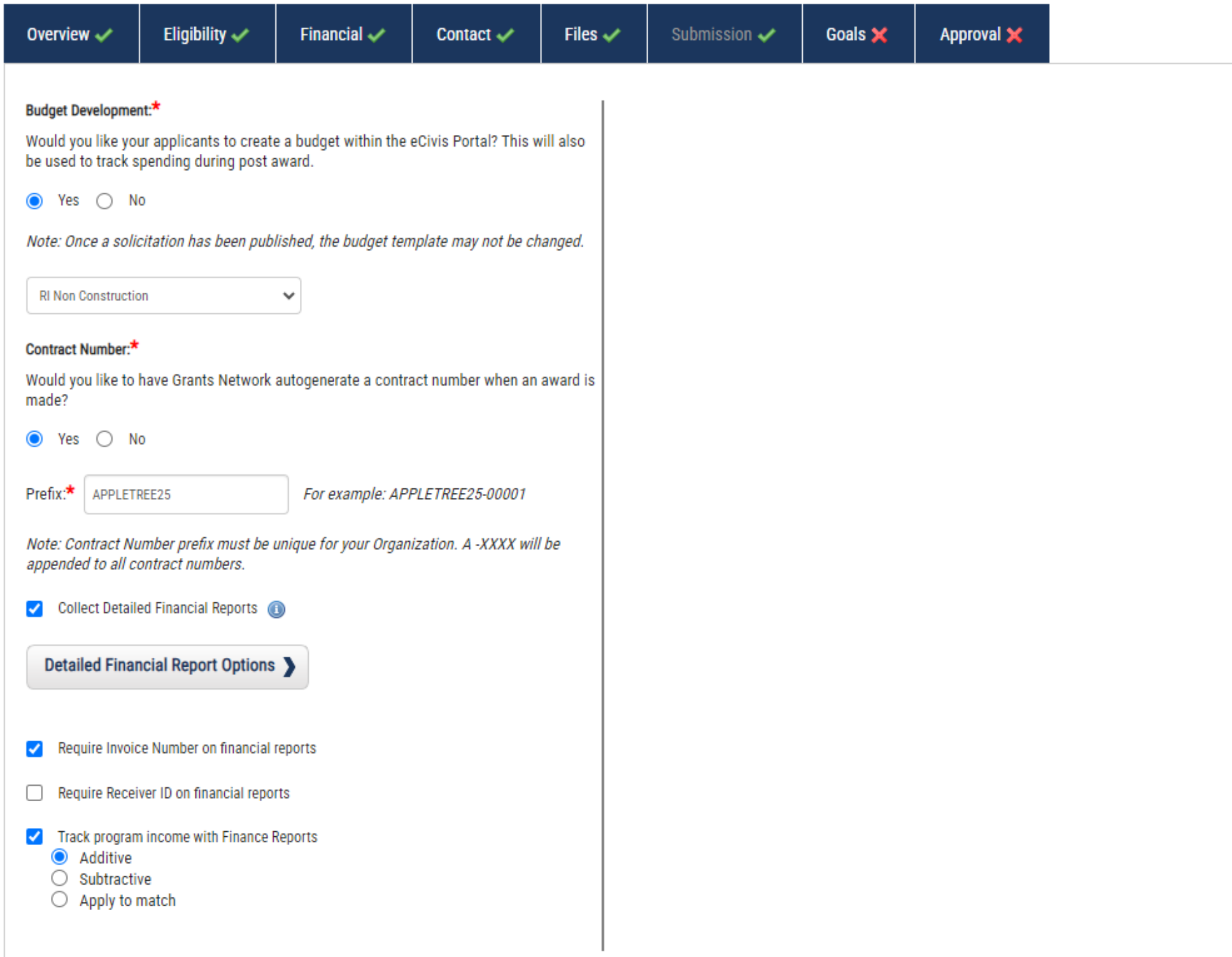
3) Contract Number: Each subaward must have a unique contract/award number. GMS can autogenerate subaward contract numbers. Select “Yes” & enter the preferred prefix. (Required field)
   a. If selecting “No”, agency users will be required to manually enter a unique contract number for each subaward during 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 accidently 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)

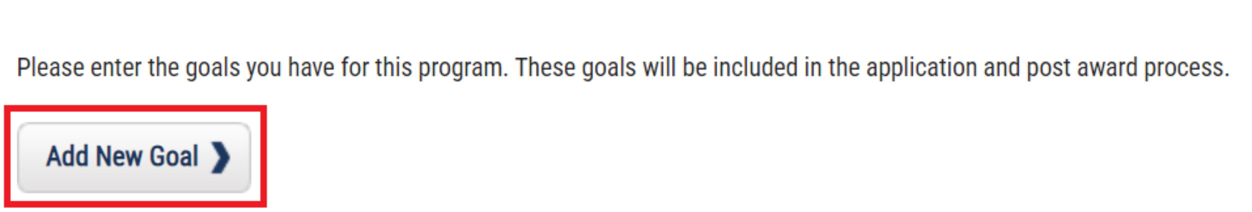
3) Track Program Income with Financial Reports: This functionality is not currently being used by the State of Rhode Island, no selection/change is needed. (Optional field)



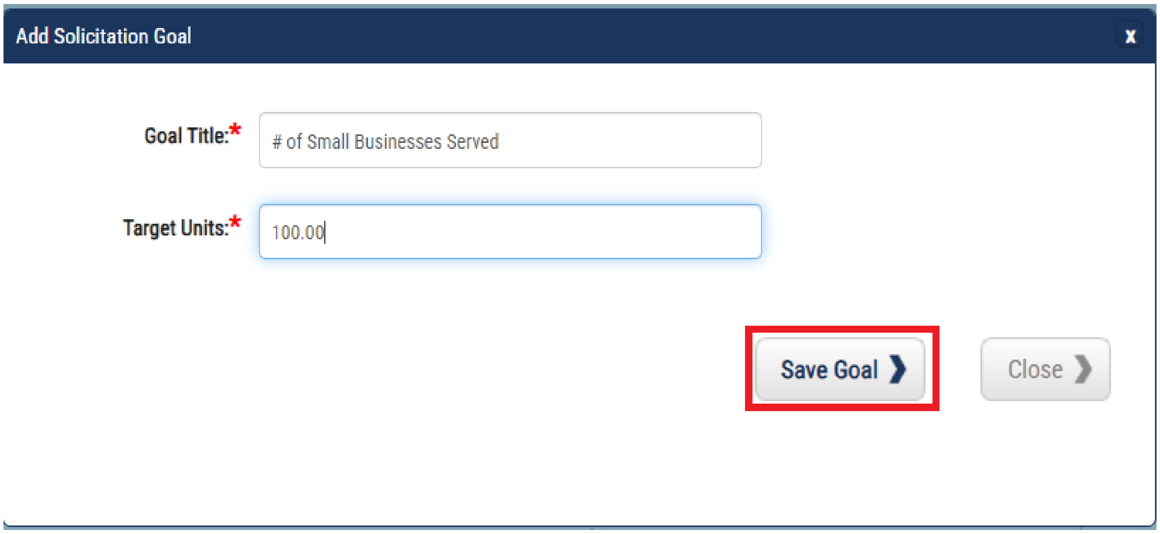
2.9. Edit Solicitation: Goals tab

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.

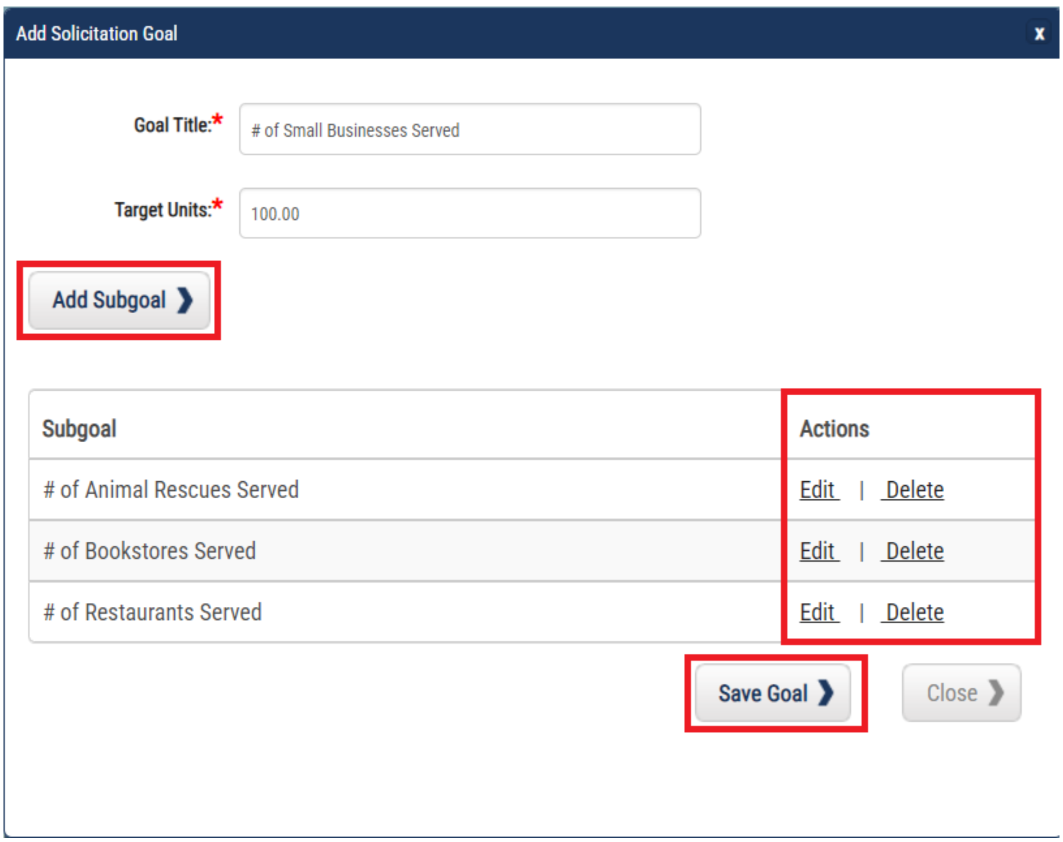
1) To add a goal to the application and program, select *Add New Goal*.



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.



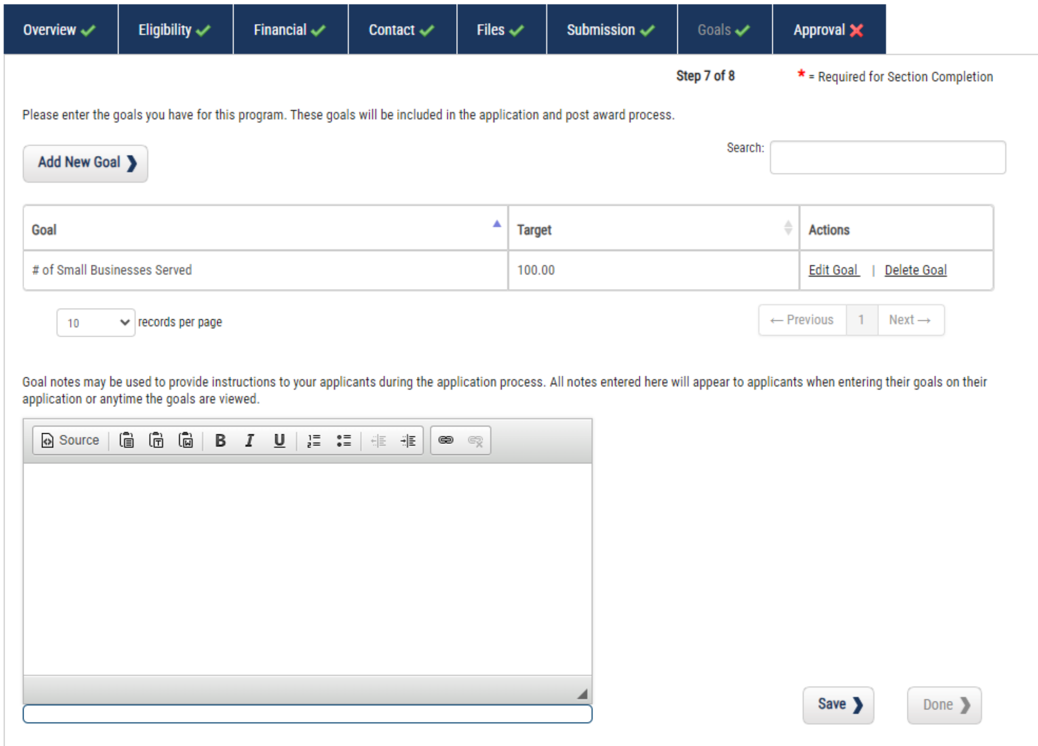
3) To add a subgoal, select *Add Subgoal.* Enter a Subgoal Title and then select *Save Subgoal*.



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.

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



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

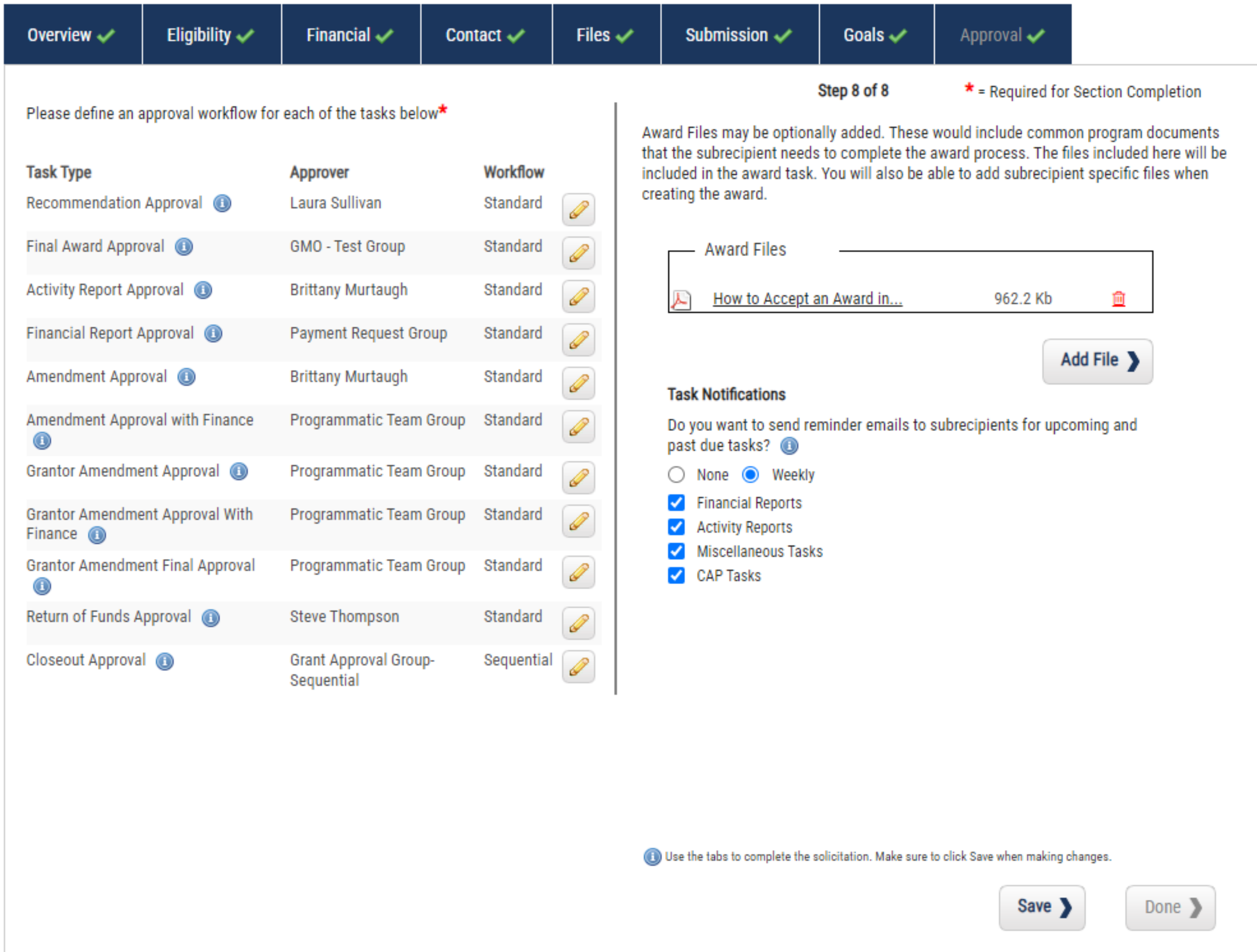
whichever approval workflow chosen by the agency, the amendment is sent to the subrecipient for them to review, make any changes, and accept or decline. (Required field)

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)



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

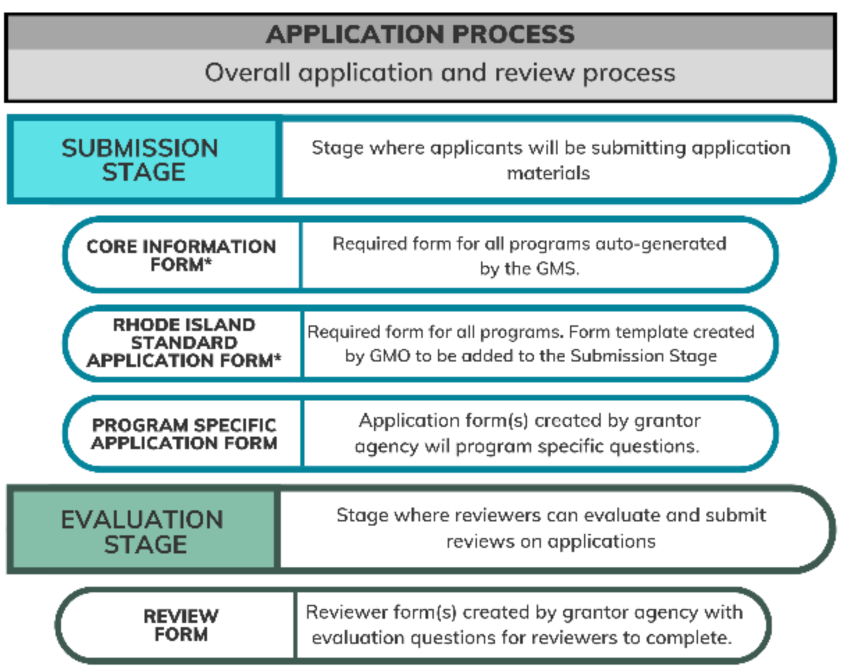
The Application and Review Manager allows agencies to build custom application and review experiences. The "Application Process" is the full experience from application set up, intake, and review. As part of this Application Process, agencies can create forms and templates for their programs. The images 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

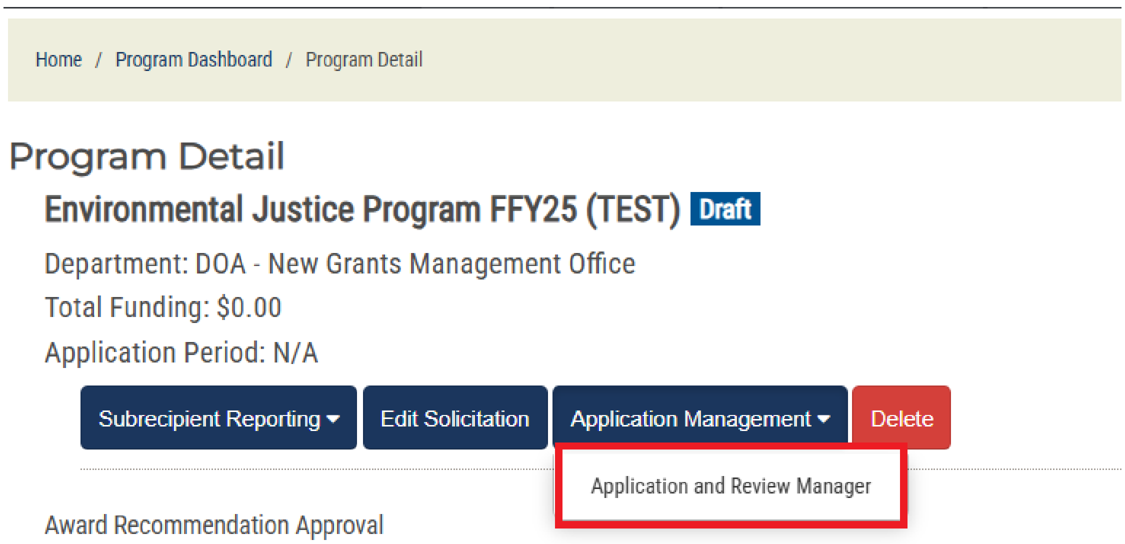
Templates allow for grantor agencies to create a Form, a Stage, or an entire Application Process to be saved and reused in the future. The use of templates is helpful for recurring programs. See [Appendix F] for more information on templates.

<u>3.2. Navigating Through ARM</u>

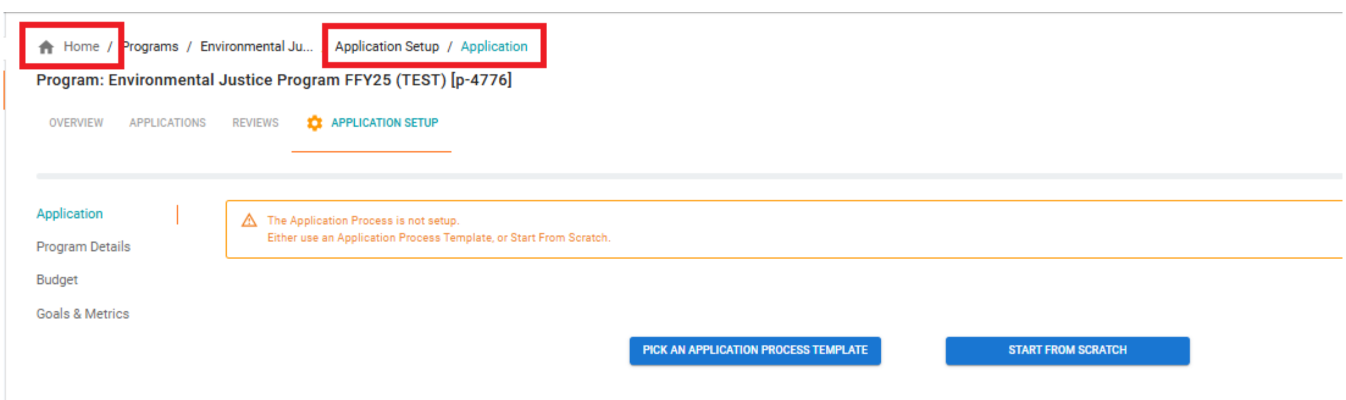
Accessing ARM

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*.

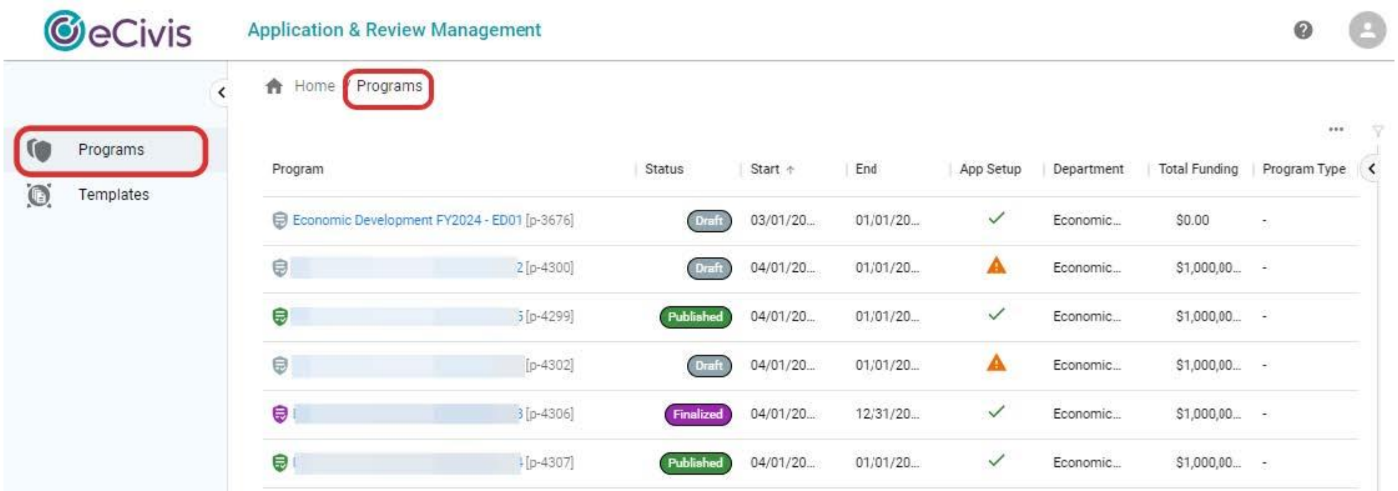


2) This will open the Application Setup section of the program selected. To get to the ARM Programs homepage, select the *Home* tab in the upper left-hand corner.



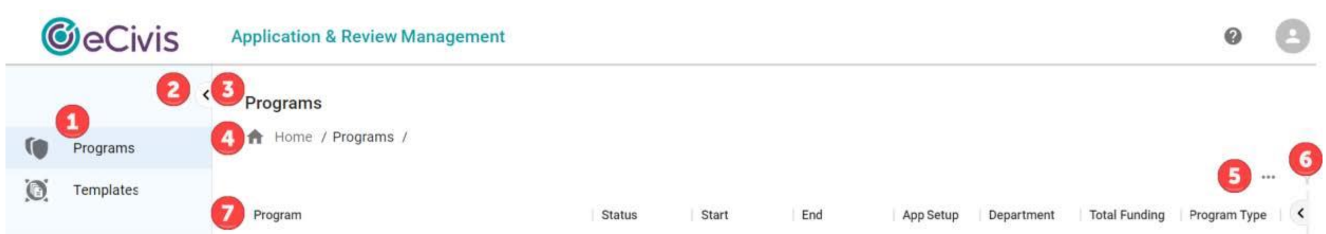
All Programs Page

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



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



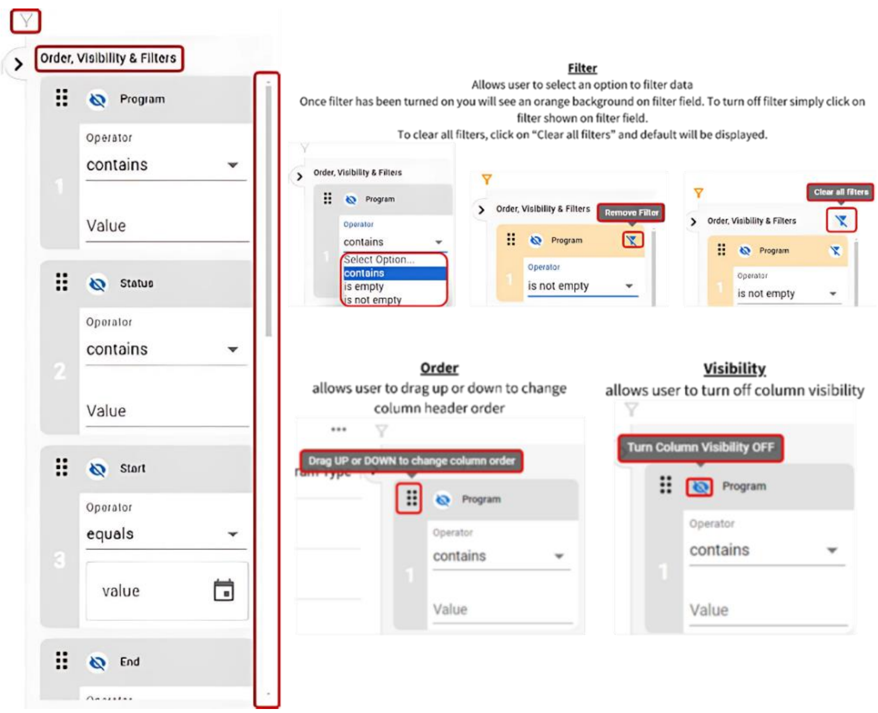
2) Column Header Descriptions

a. Program: name and unique identifier for Program Solicitation.
b. Status: status of the Program (e.g. Draft, Finalized, Published, Closed, Archived).
c. Start: the start date of the Application Process set up for program. This date must be earlier than all other stage or form dates.
d. End: the end date of the Application Process set up for this program. This date must the later than all other stage or form dates.
e. 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.
f. Department: the department name in which this Program was created.
g. 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
Small Business Support ARM FY2023 [p-3647]	Draft	-	-	⚠	Adminis...	$0.00	-
Economic Development FY2024 - ED01 [p-3676]	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

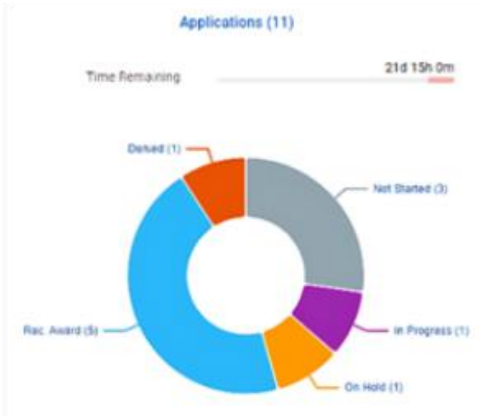
Selecting a hyperlinked Program name from the All Programs list will open a Program Page. Use this page to view and manage the applications and reviews for a singular program.

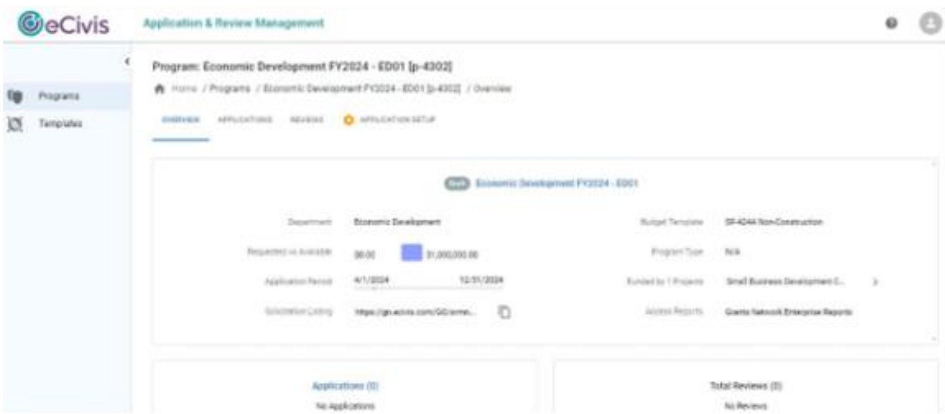
Key Features of Program Page:

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

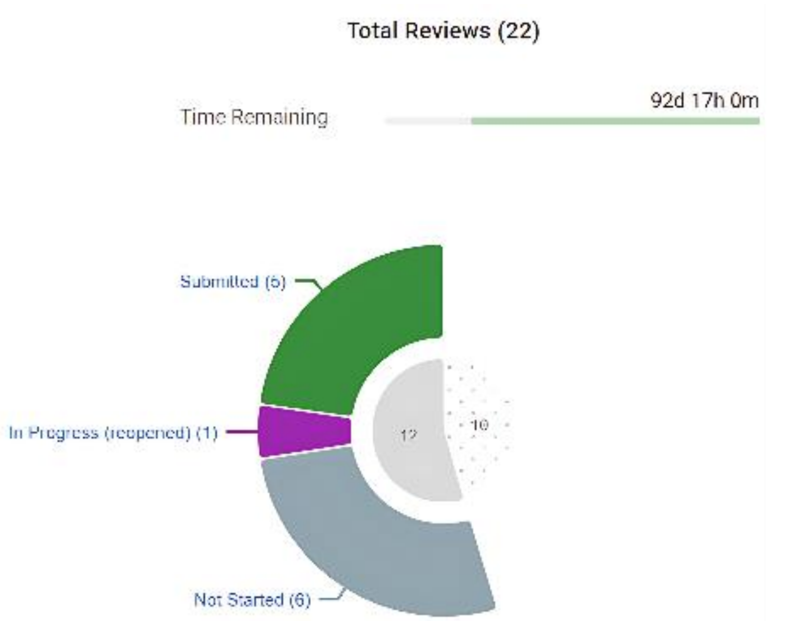
- Program Information and Status: General information and the status of the program.
- Applications Chart: This section provides a pictograph of the Applications submitted, how much time is remaining in the Application Process, and lists the statuses of Applications (e.g., Not Started, In Progress, On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

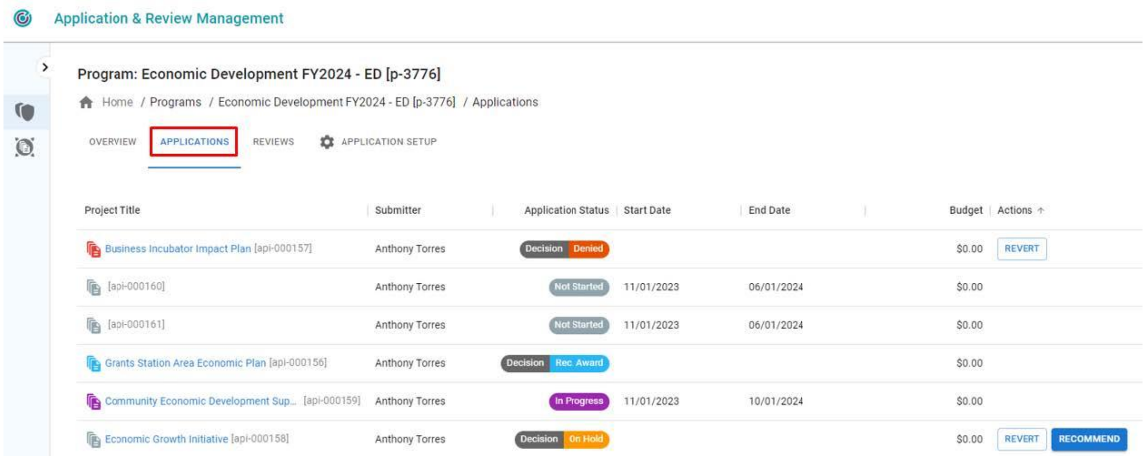




- Total Reviews Chart: This section provides a pictograph of the Total Reviews submitted, how much time is remaining in the Application Process, and lists the statuses of Applications (e.g., Not Assigned, Not Started, In Progress, Submitted).

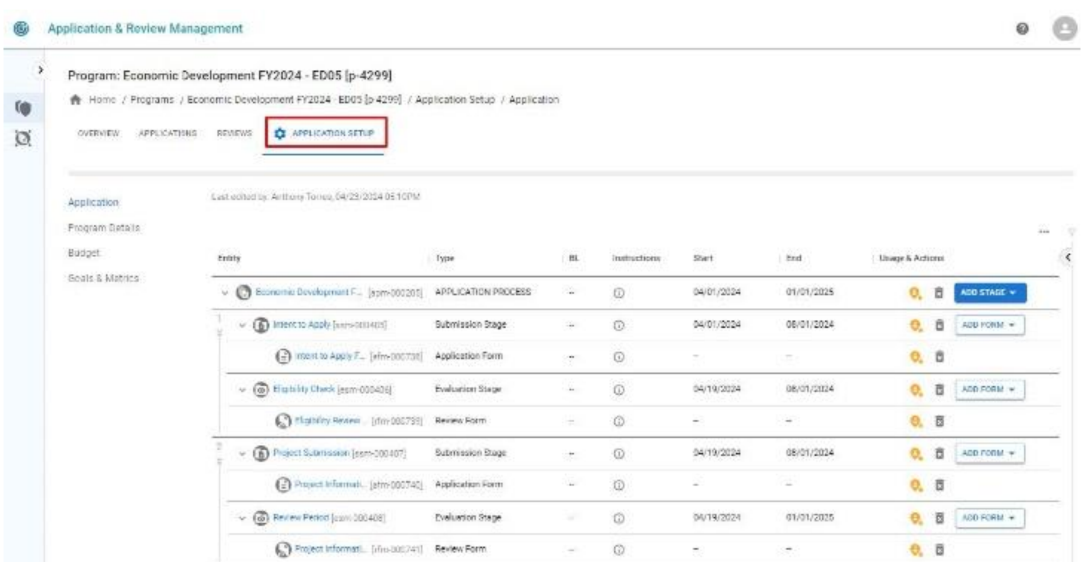


b. Applications Tab: Applications will populate here once applicants start the application process. **NOTE**: The Overview, Applications, and Reviews tabs will not be visible until the program is published.



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.

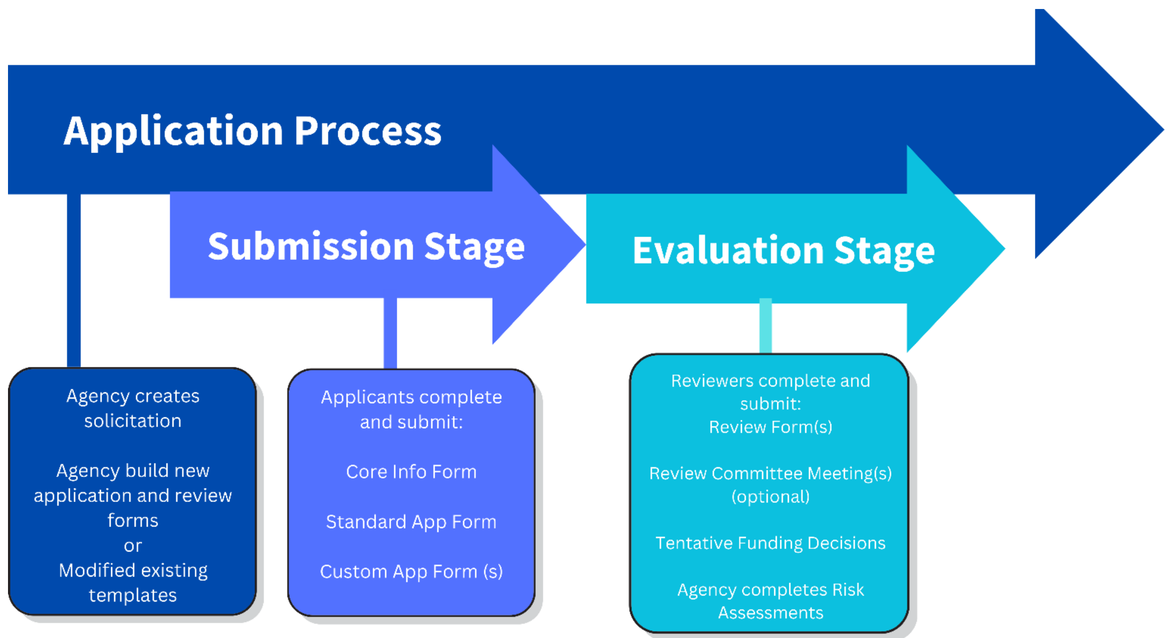
d. Application Setup Tab: The Application Setup page will display the details of the Application Process. It is also where all editing and building of the Application Process will initiate.



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.

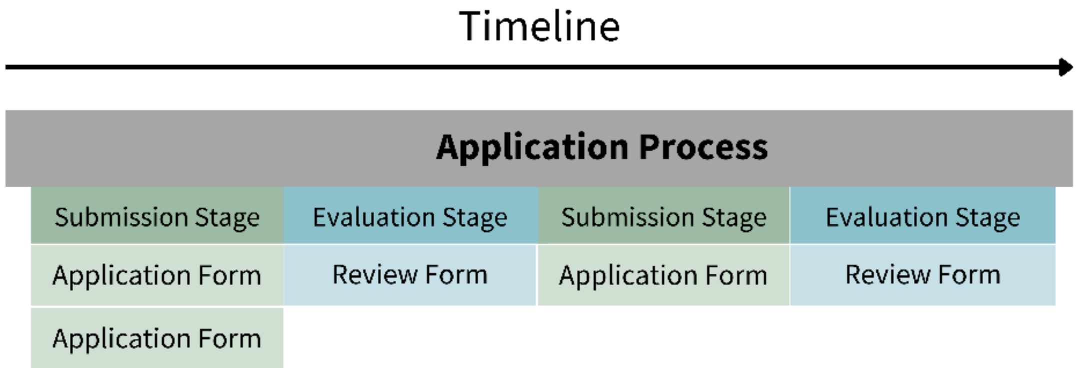


1. Standard Application Process: One Submission Stage with Three Application Forms followed by One Evaluation Stage with One Review Form.

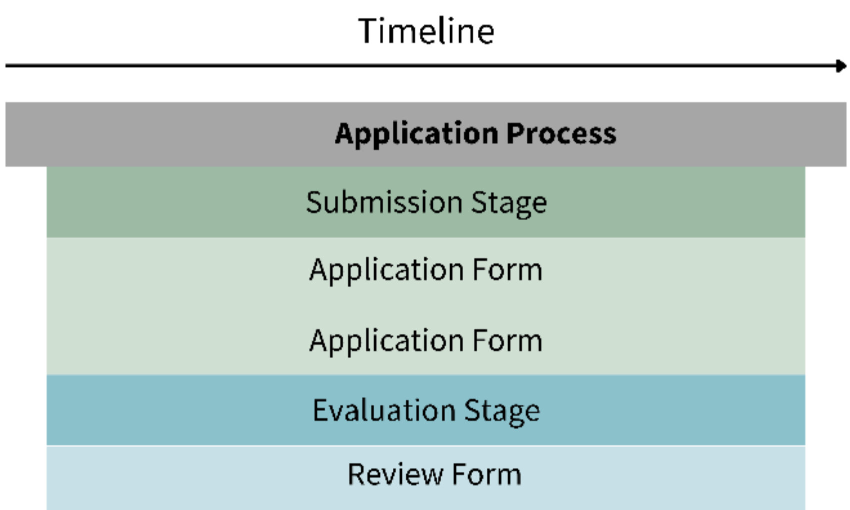
Timeline

Application Process	
Submission Stage	Evaluation Stage
Application Form	Review Form
Application Form	
Application 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.



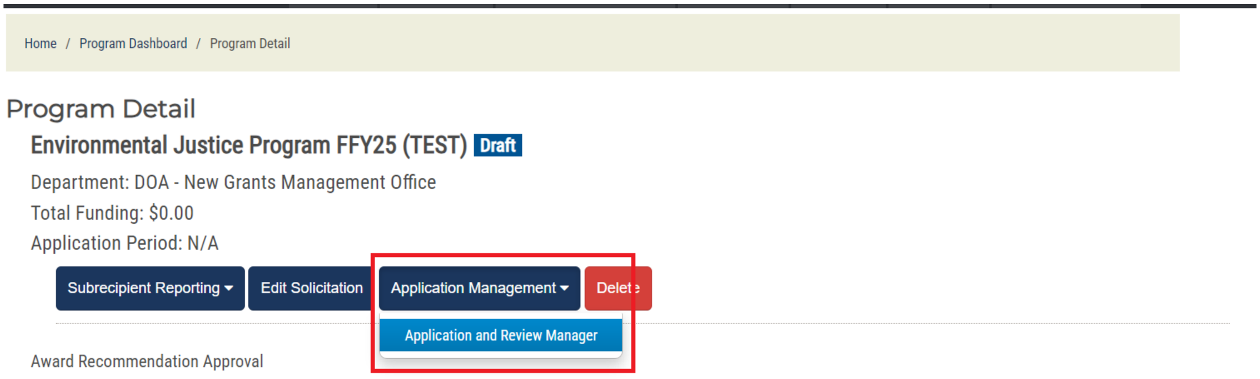
3. Rolling Application Process: One Submission Stage with two Application Forms occurring simultaneously with One Evaluation Stage and one Review Form.



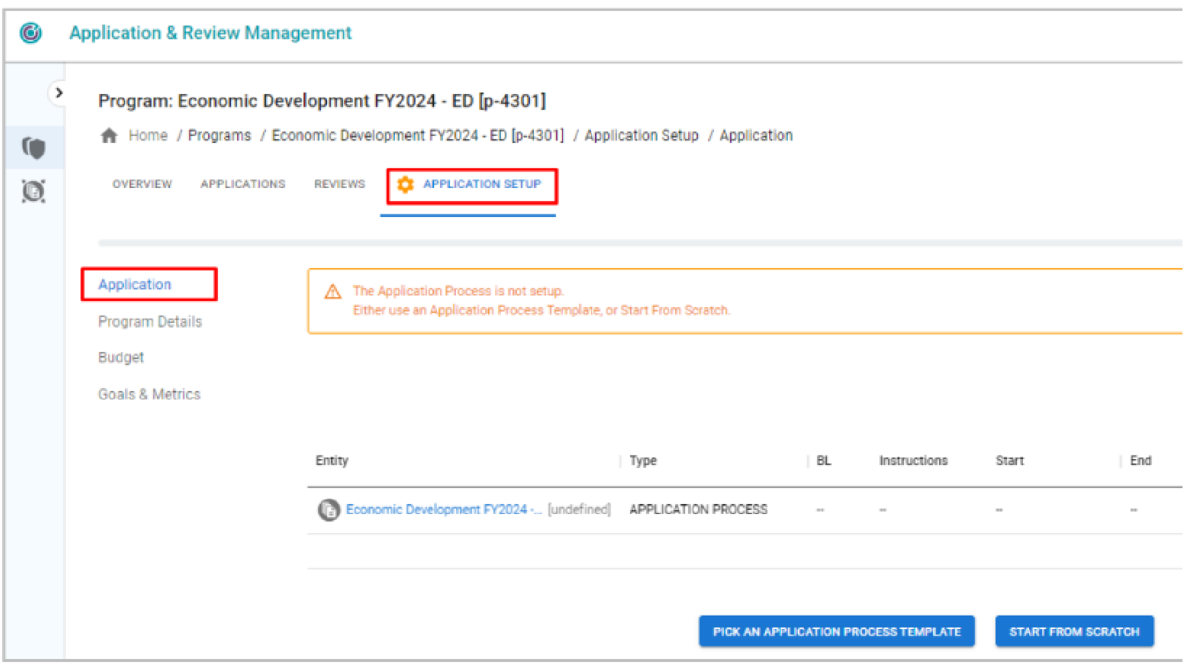
4. For all Application Processes:
    a. At least one Submission Stage and Application Form must be created before an Evaluation Stage can be created.
    b. All Stage and Form timelines must fall within Application Process timeline.
    c. All Application Form timelines must fall within the Submission 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

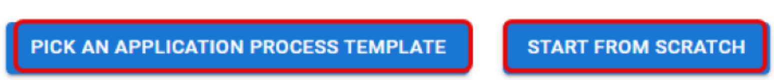
1) From the Program Dashboard select *Application Management – Application and Review Manager* to navigate back to ARM from Grants Network.



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.



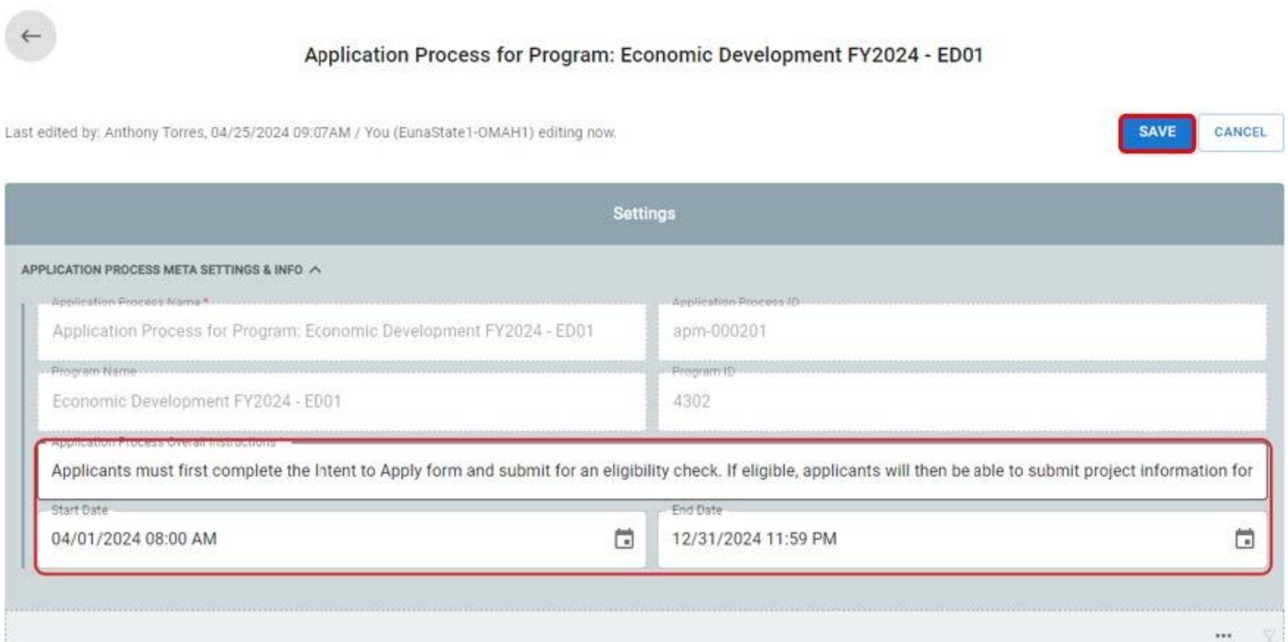
NOTE: Templates need to be previously created following the instructions in Appendix F.

4.3. Starting from Scratch

Application Process Information

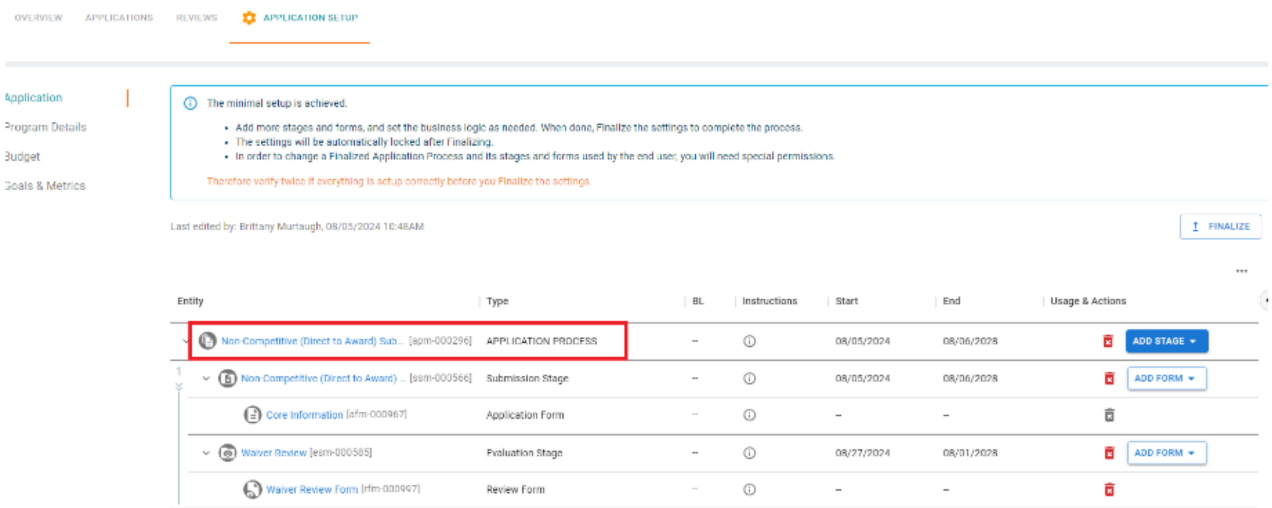
If *Start from Scratch* was selected above, follow directions in this section.

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.



   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.



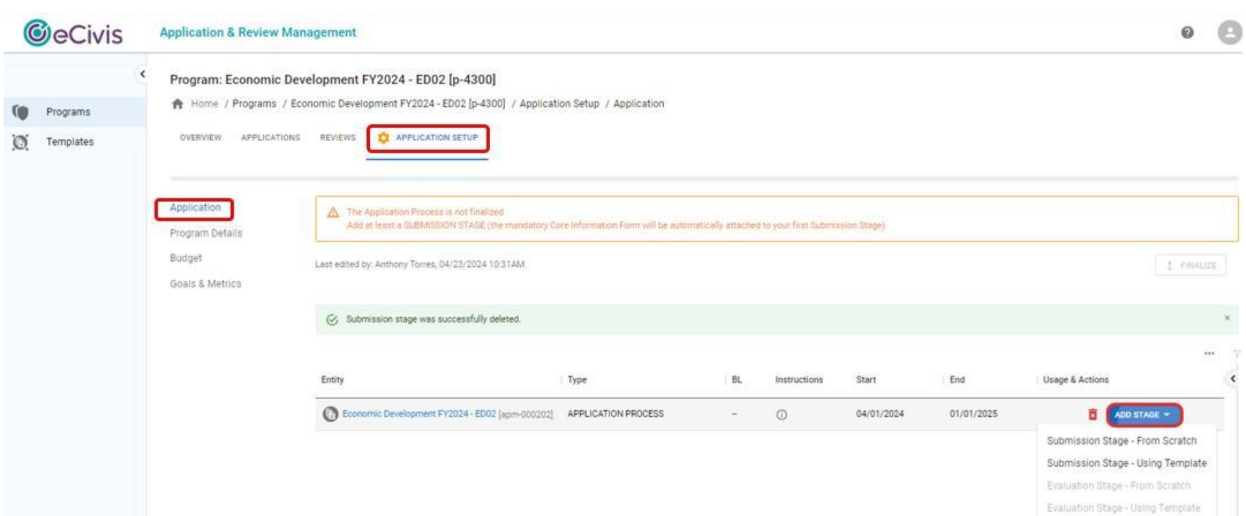
4.4. Add Submission Stage and Forms

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

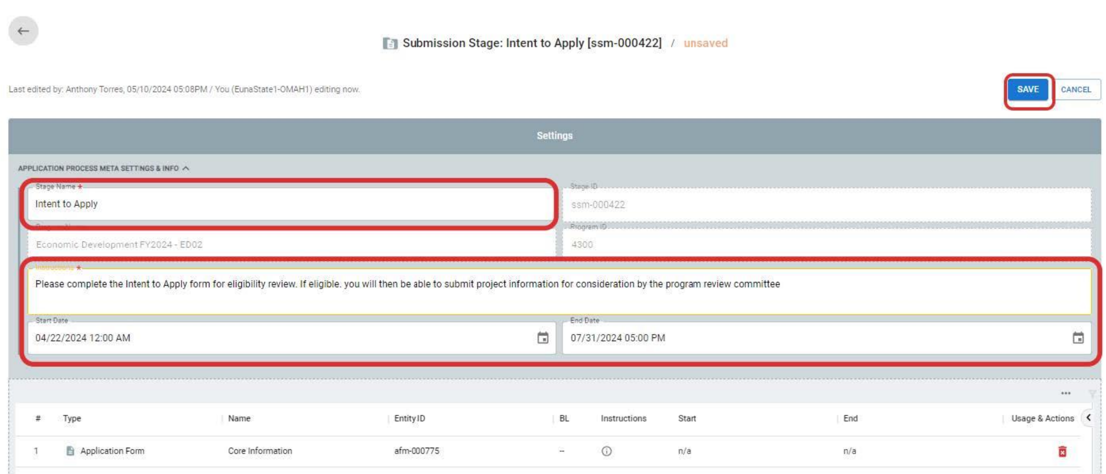
1) Staying on the “Application Setup” tab, select the blue *Add Stage* button on the righthand side of the page to add a Stage.



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.

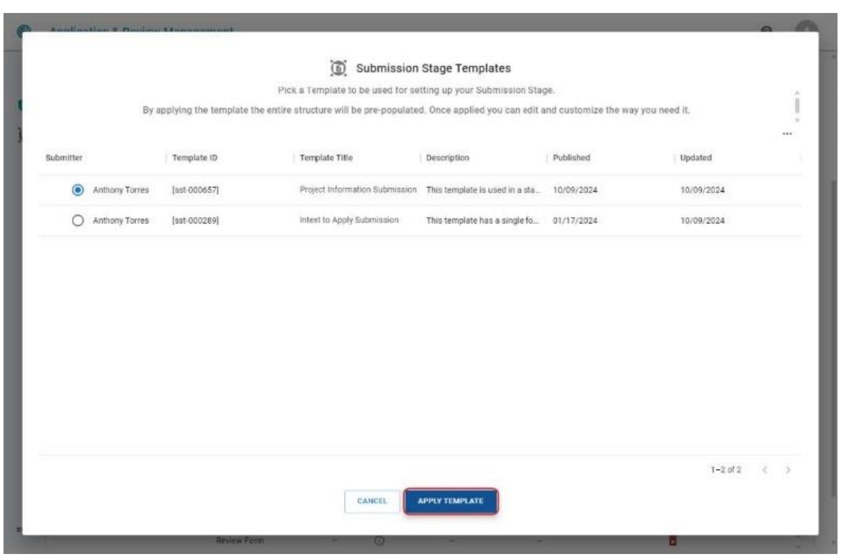
NOTE: If left unspecified, Start and End Dates will default to the date range of the Program's entire Application Process.



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

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

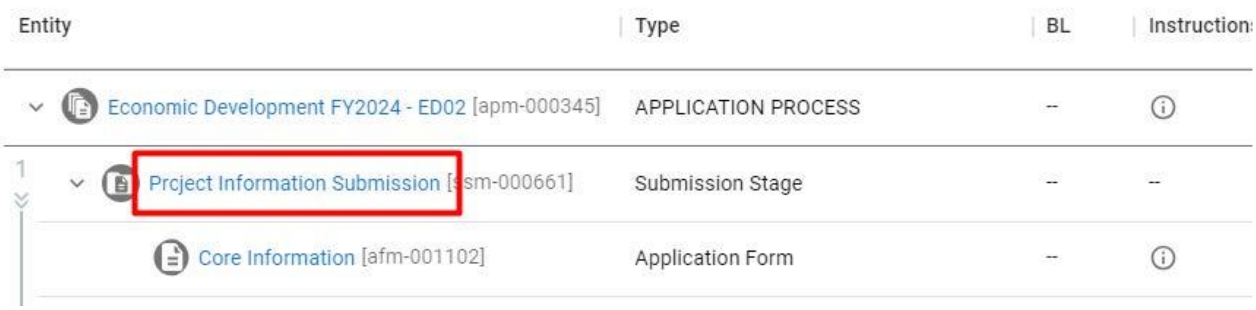
   a. A new window will appear, and previously created Stage templates will be visible. Select the Stage template to add to the Application Process. Select *Apply Template*.



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.

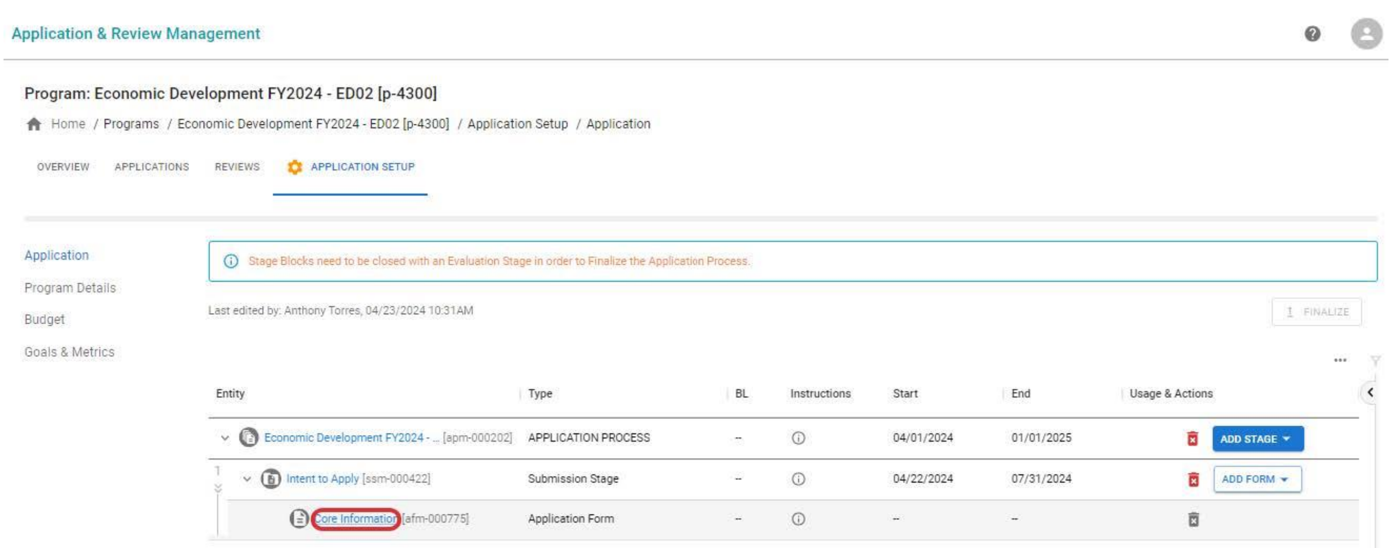


4) Now that a Stage has been created, form(s) can be added to this stage.

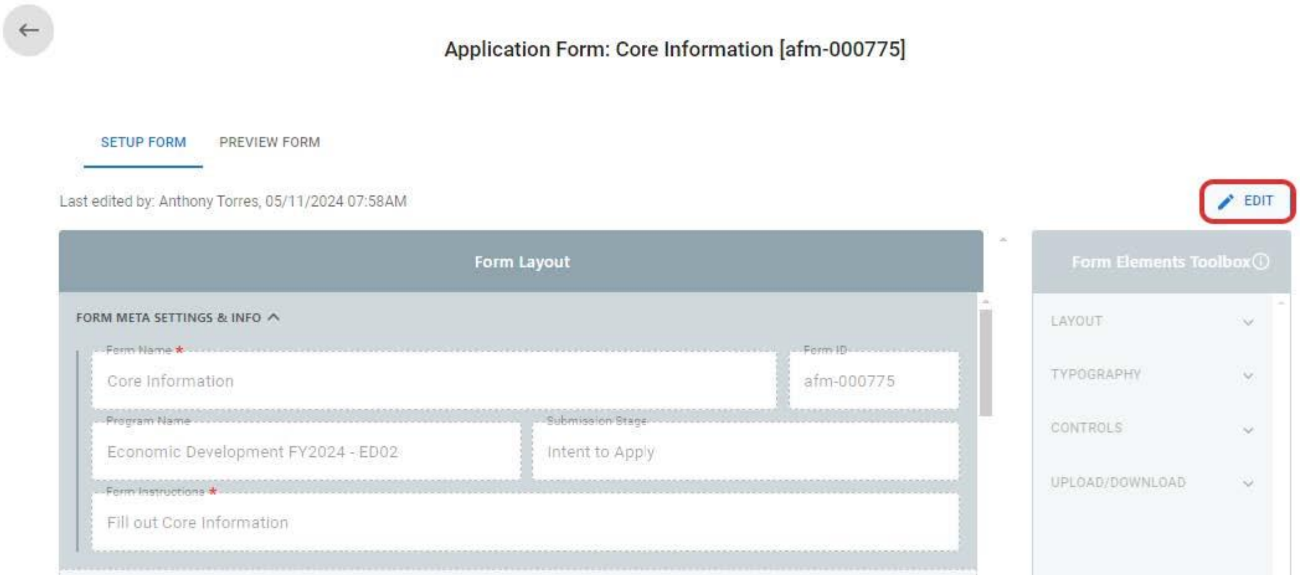
Core Information Form

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.



2) Select the *Edit* button.



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.

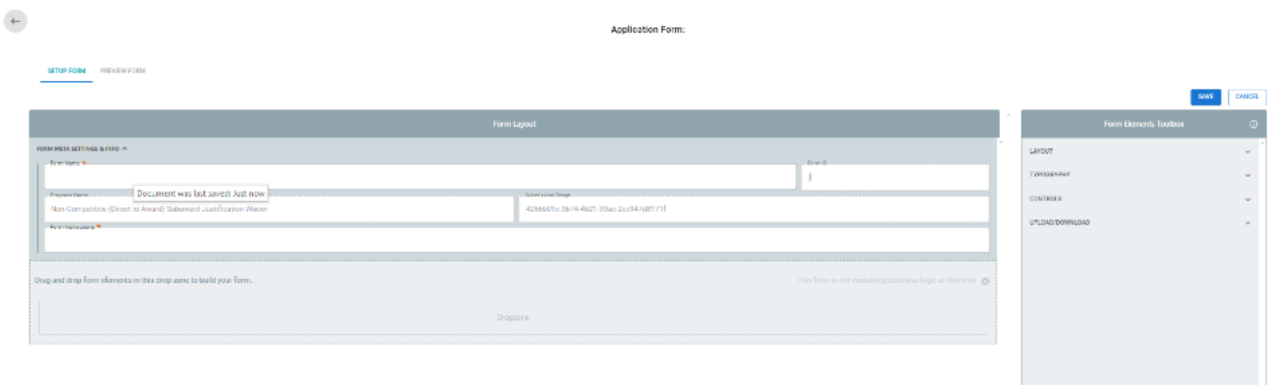
1) In the Application section under "Application Set Up", select *Add Form* for the Submission Stage.
2) There will be 2 options, select *Using Template.* A new window will pop up.
3) From the list of available templates, select the "State of Rhode Island: Standard Application Form Questions."

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.

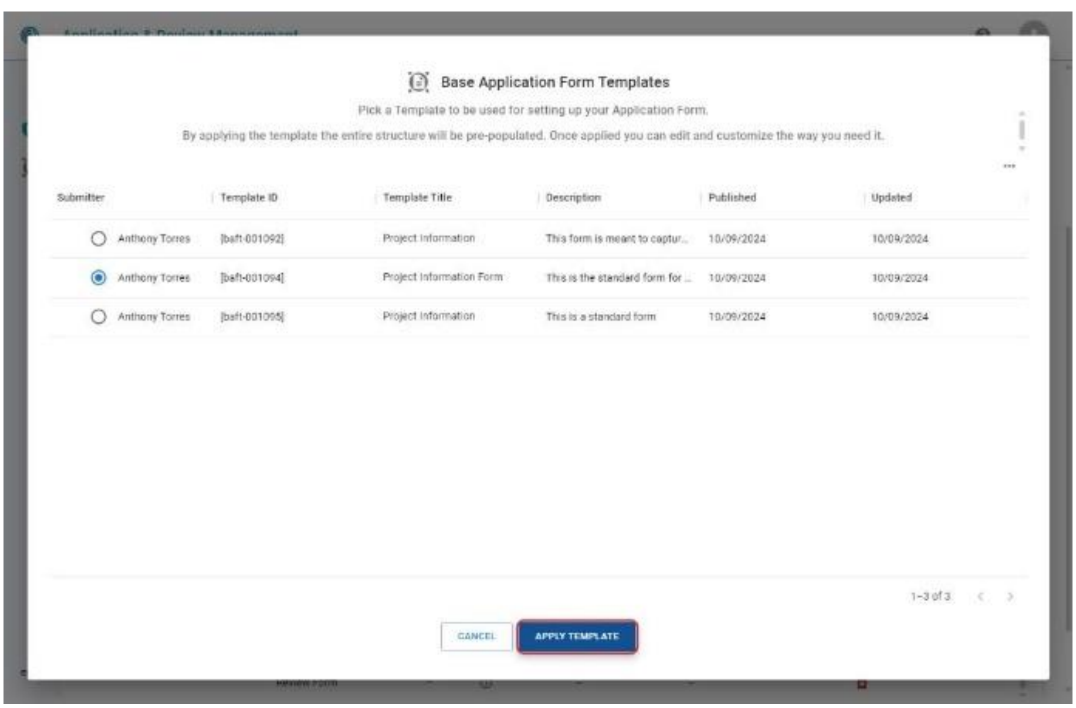
Add Custom Application Form

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.

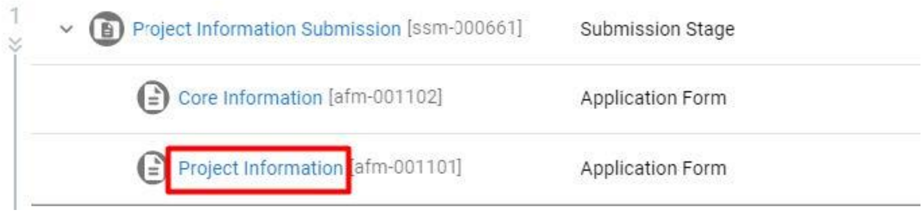
1) In the Application section under "Application Set Up", select *Add Form* for the Submission Stage.
2) There will be two options. Select *From Scratch* if a Form Template has not been previously created. Select *Using Template* if a Form Template was previously created.
   a. If selected "From Scratch", 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.



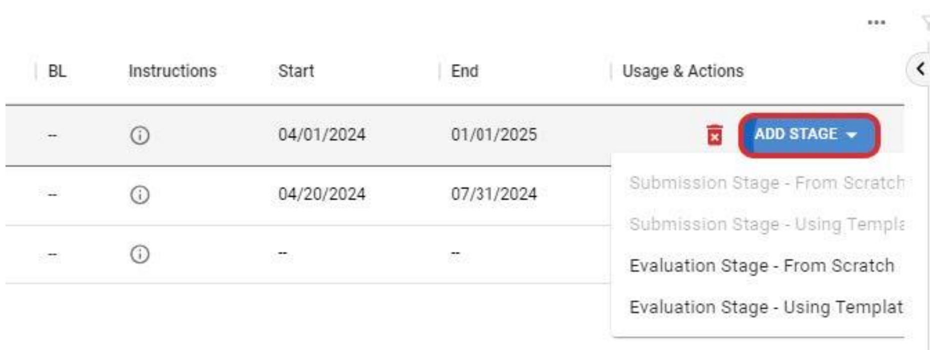
4) Continue to add/edit Submission Forms under the Submission Stage until all information for the application is complete.

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.

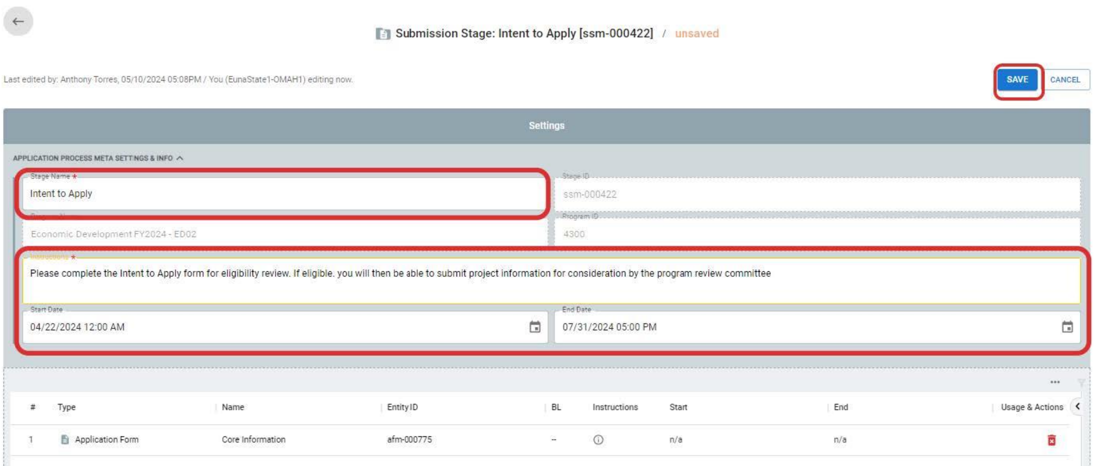
NOTE: See Appendix F for information on how to build templates.

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.

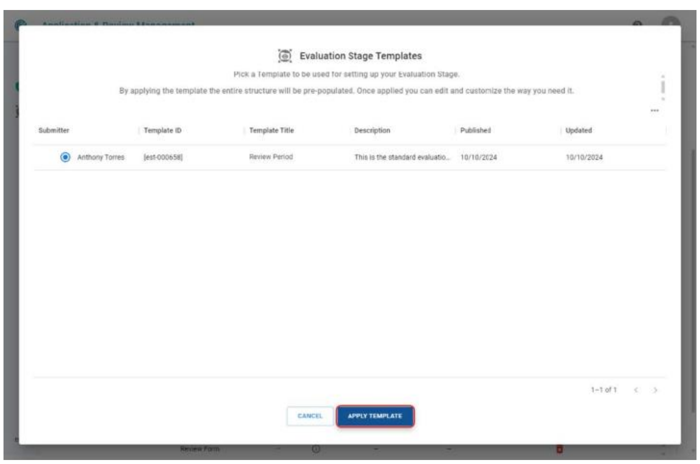
NOTE: If left unspecified, Start and End Dates will default to the date range of the Program's entire Application Process. If the preferred Evaluation Stage end date is greyed out, navigate to the Application Process and extend that end date. Then return to the Evaluation Stage and adjust the end date.



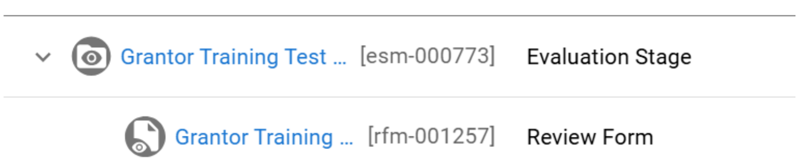
NOTE: To add additional Evaluation Stages, repeat steps above.

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.

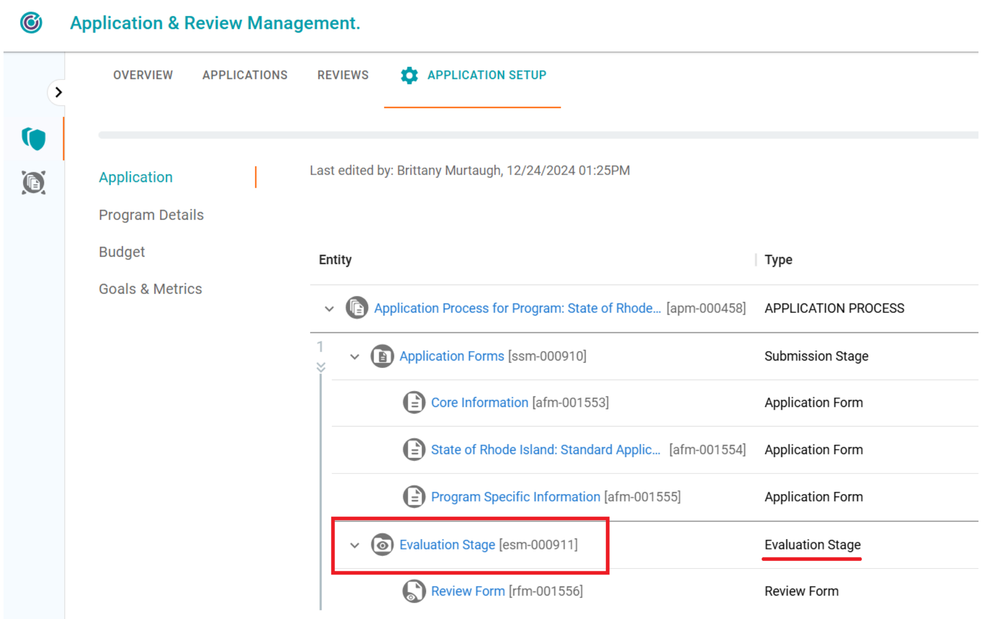


6) Now that a Stage has been created, Review Form(s) can be added to this stage. See next section for additional details.

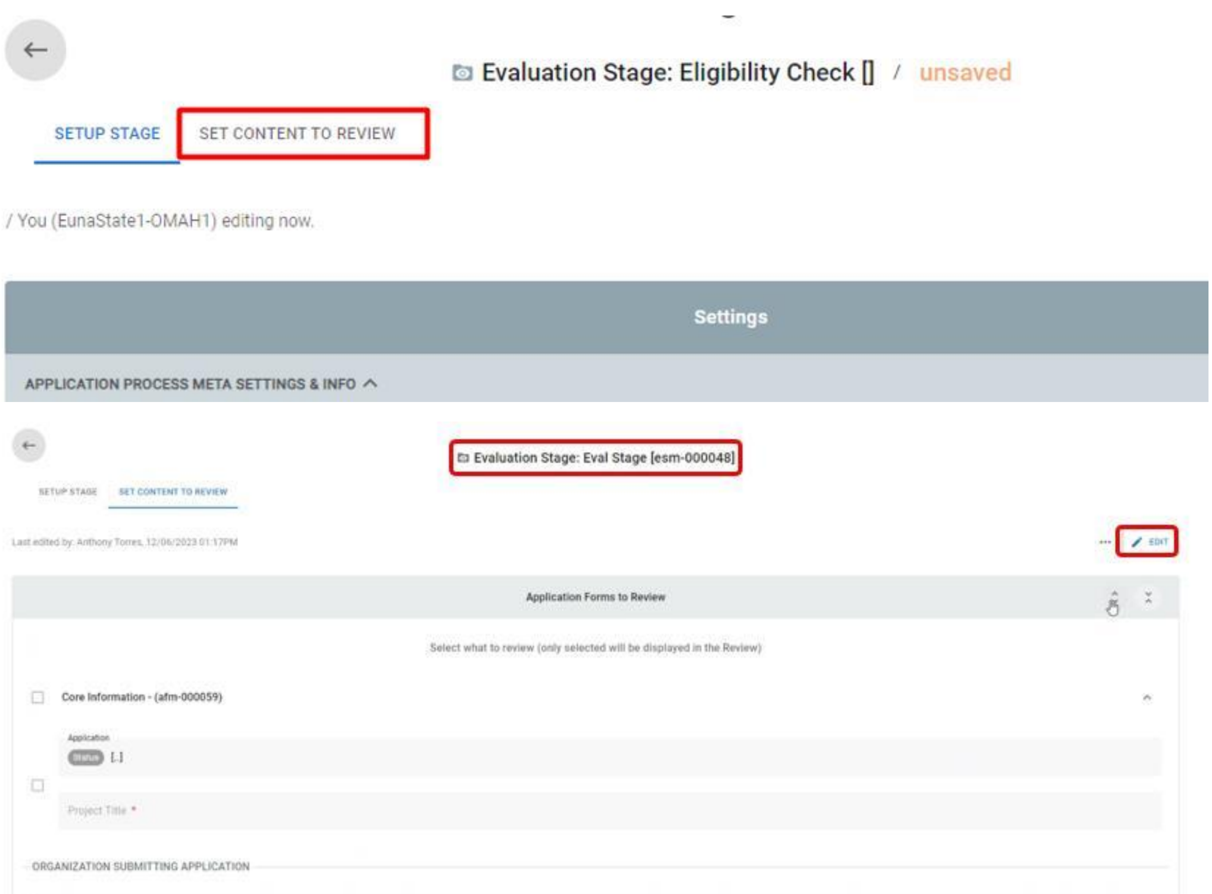
Set Content to Review

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.

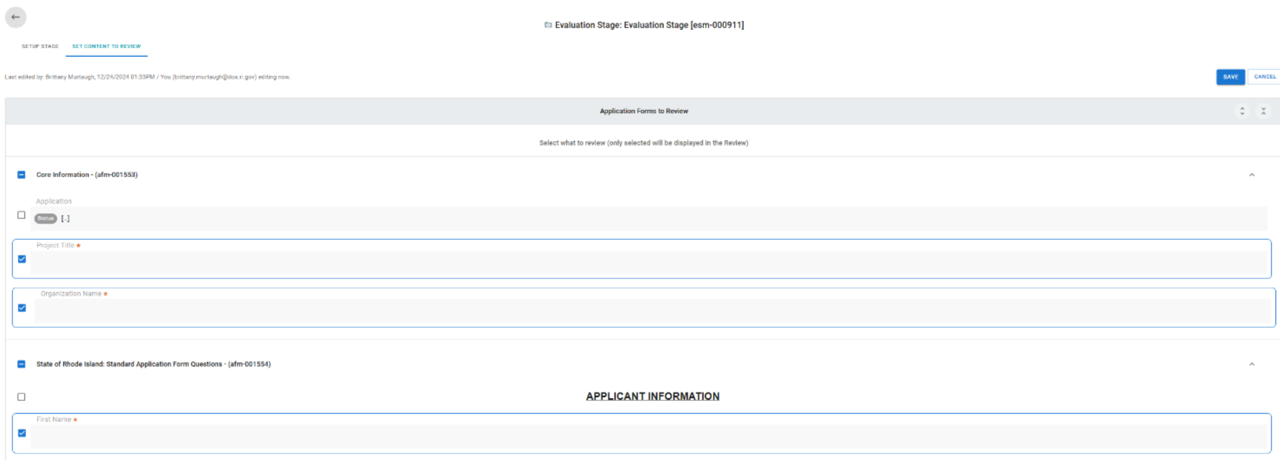


2) At the top of the page, select the *Set Content to Review* tab and select *Edit*.

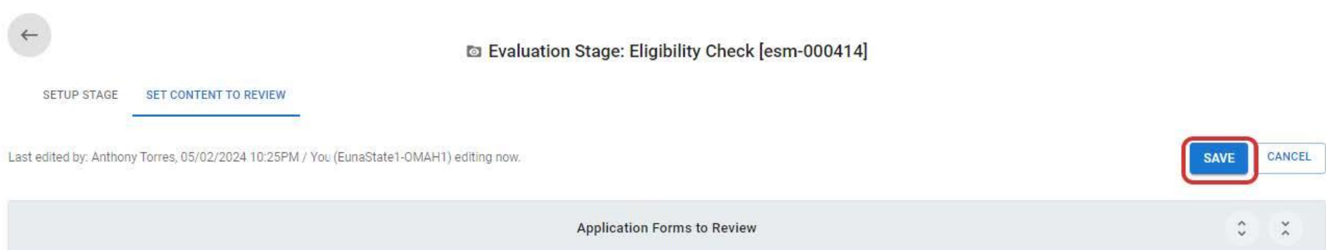


3) Select the checkbox next to any Application Form fields to include for reviewers during this Evaluation Stage.

   NOTE: To select all fields within that Application Form, select the top checkbox beside the name of that form.



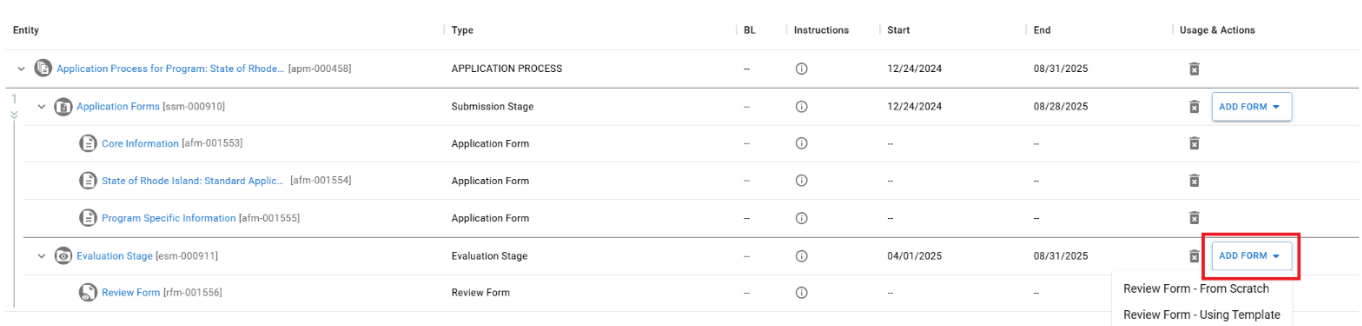
2) Once questions have been chosen, *Save*.



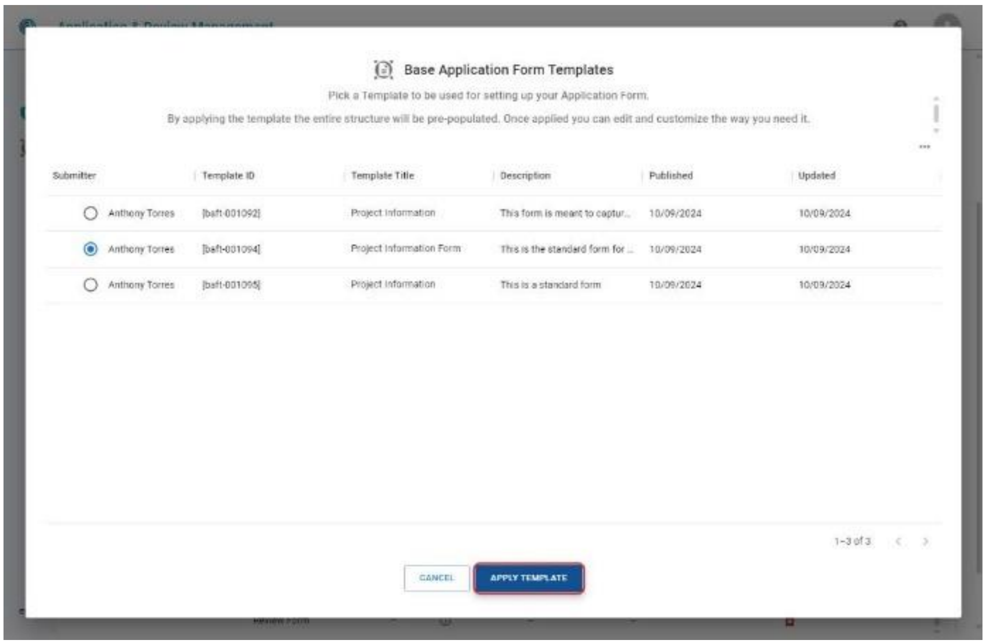
Add Review Form

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.

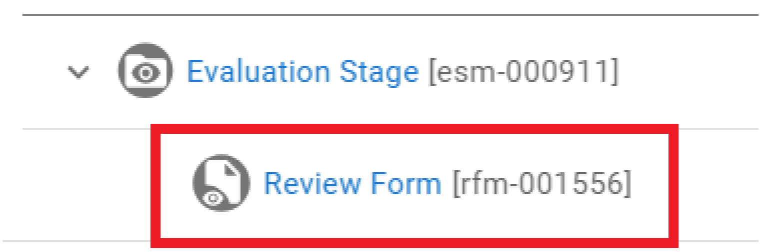
1) In the Application section under the "Application Set Up" tab, select *Add Form* under the correct stage.



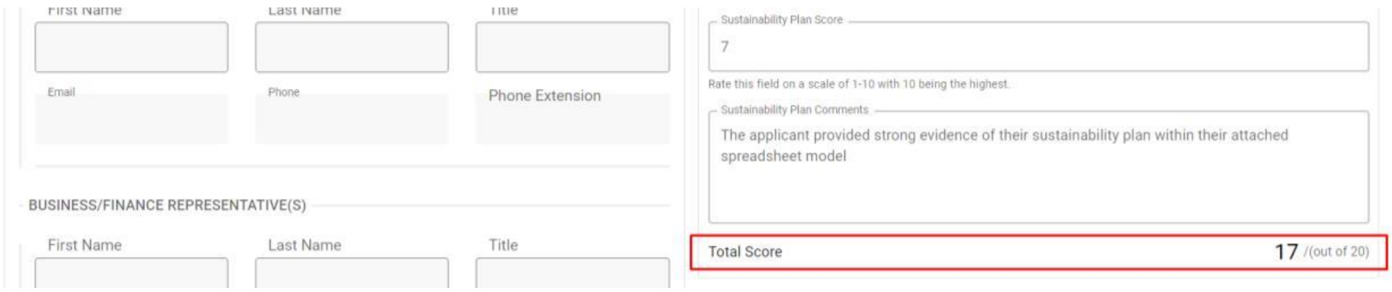
2) There will be two options, “From Scratch” and “Using Template”. The GMO has created two Review Form templates for agencies to use. The “Review Form (Ranked)” and the “Review Form (Non-Ranked). Select “Using Template” to see the template options.
3) A new window will appear, and previously created 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.



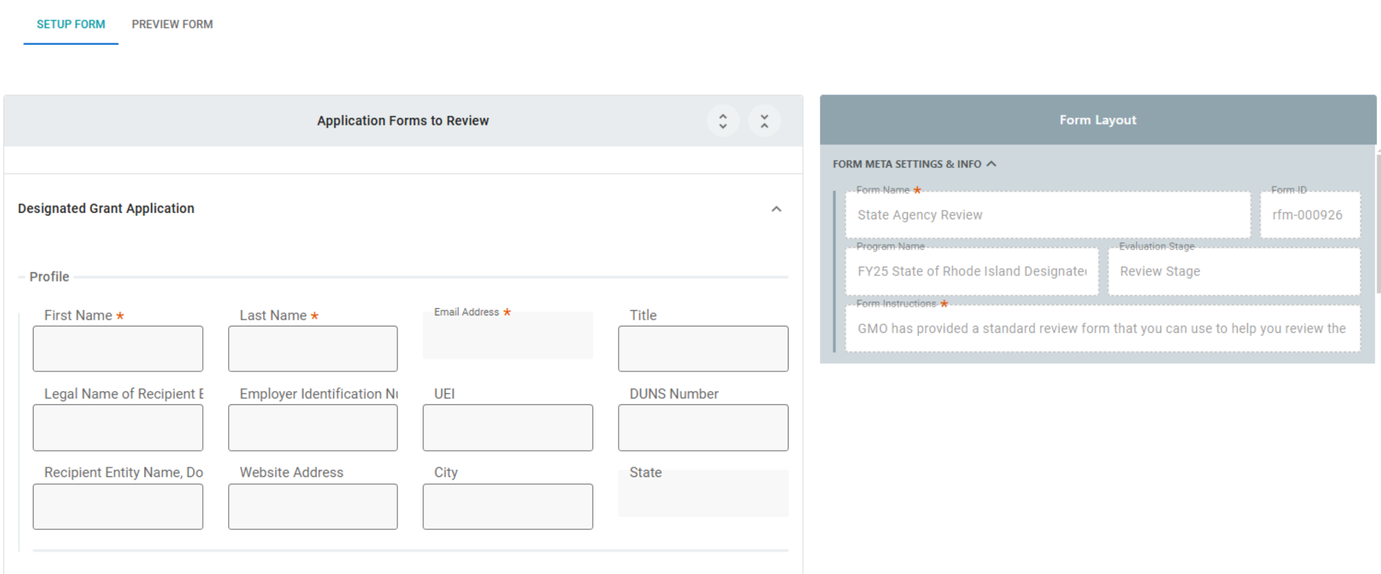
5) If edits to the Review Form are needed, select the hyperlinked name of the form to access the edit options. See [Appendix E](#) for how to add fields and edit forms.



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”.



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.



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

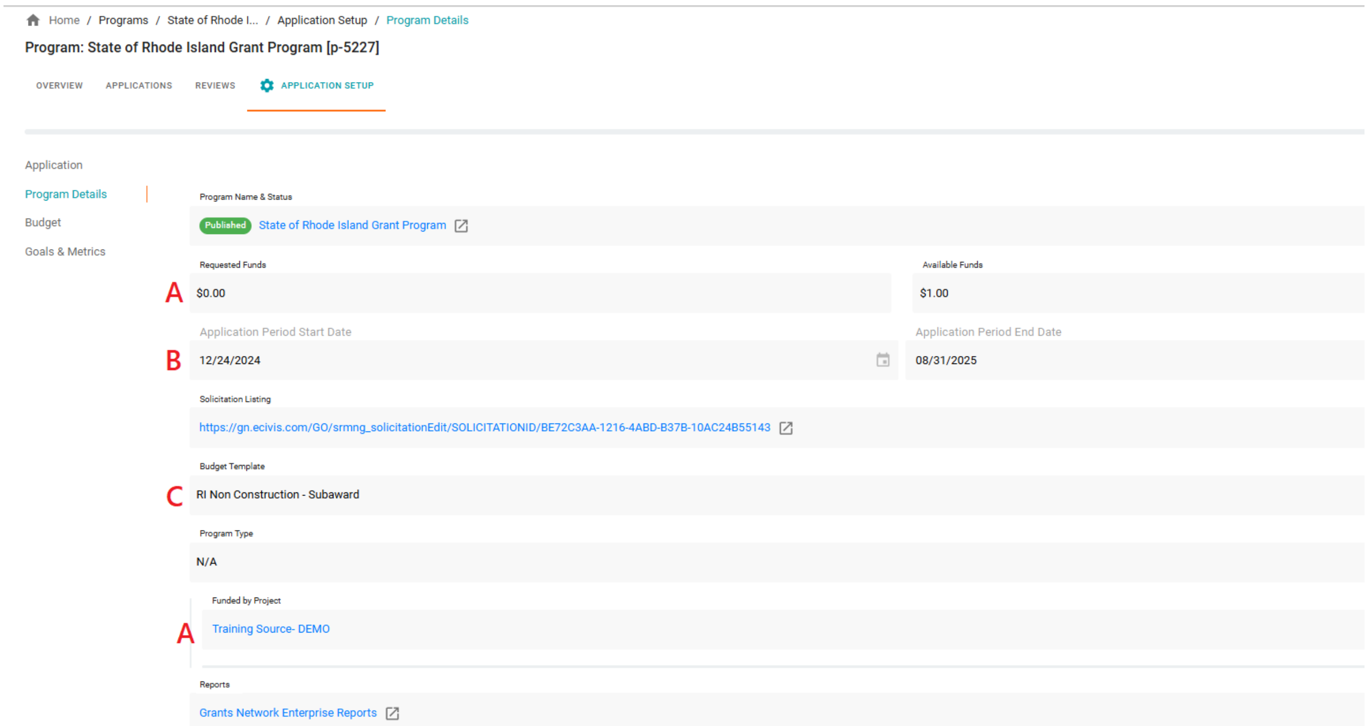
Navigate back to the solicitation in Grants Network and ensure the information below is accurate.

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

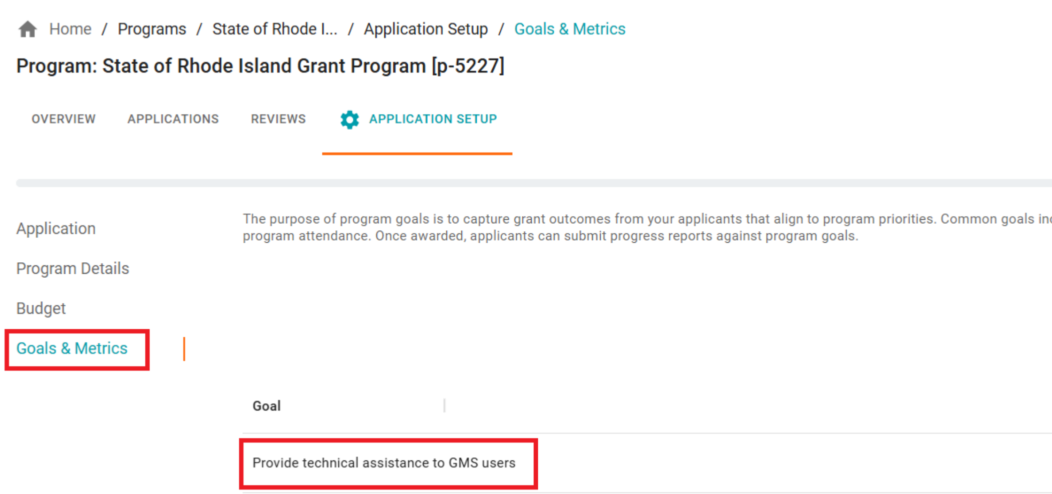
Review Application Process Information

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.



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



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 **<u>cannot</u>** 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 <u>can</u> be changed once Ready to Publish has been selected include, but are not limited to.

   a. Can add new forms

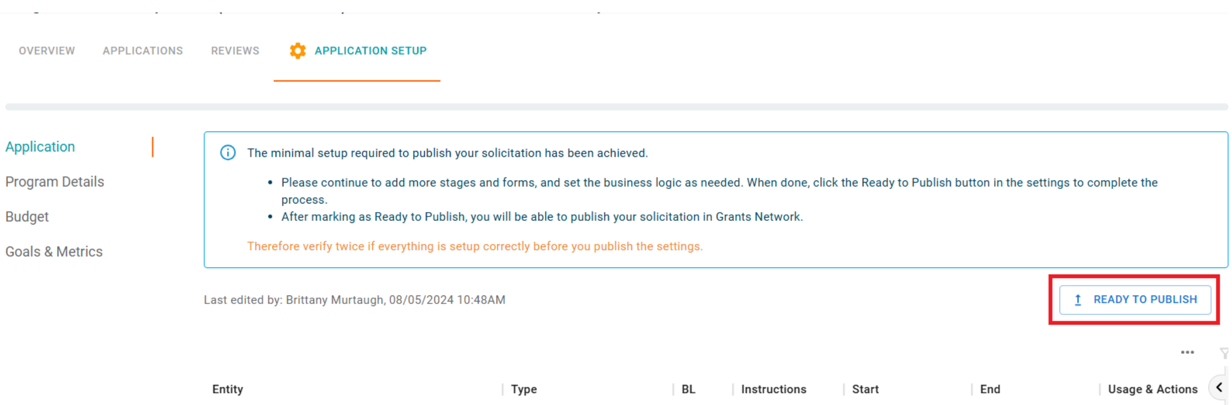
   b. Can add/remove optional fields (but not required fields)

   c. Can change/update Goals

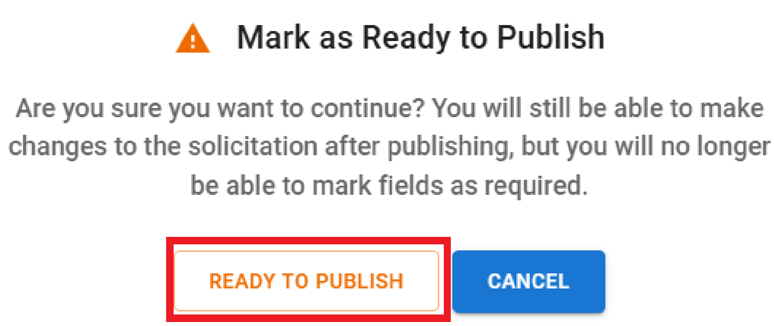
   d. Application Process, Stage, and Form start/end dates

<u>5.2. Publish Program</u>

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.



2) Confirm the selection in the popup message.



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.

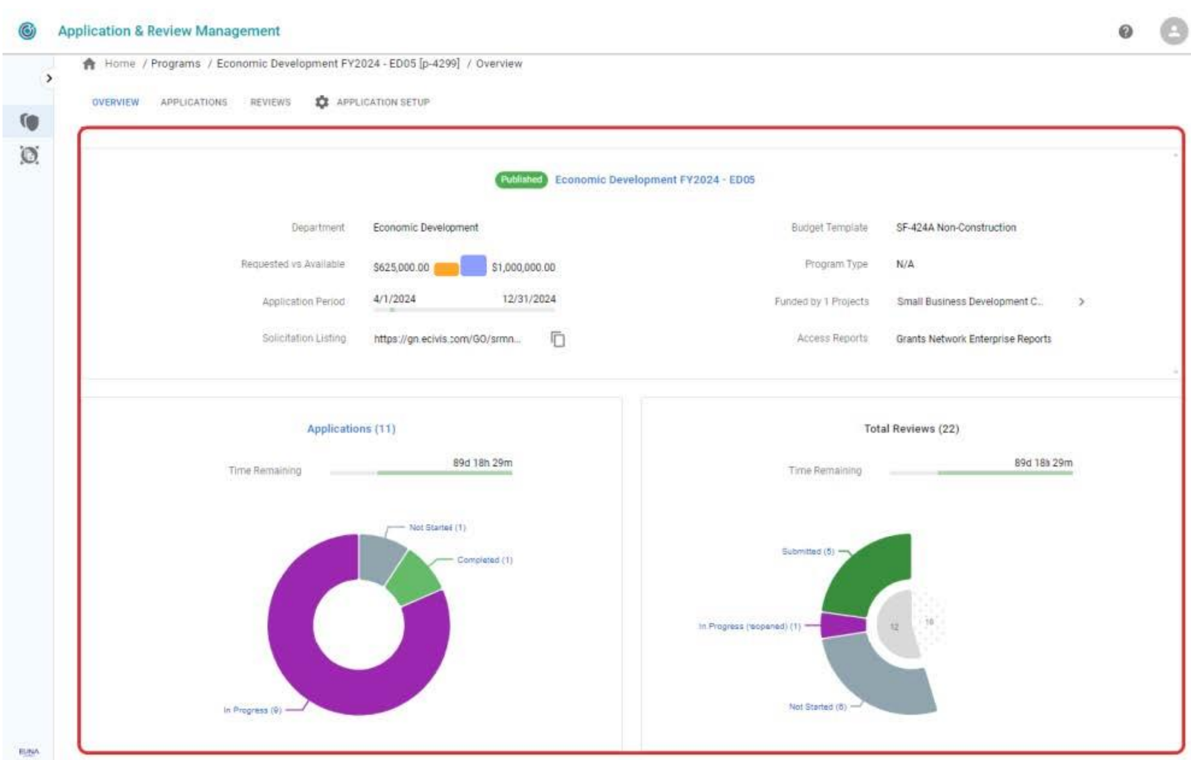
   NOTE: For Non-Competitive (Direct-to-Awards): Complete steps 3-5 above and review all info in Appendix D.

Phase 6: Managing and Monitoring the Application Process

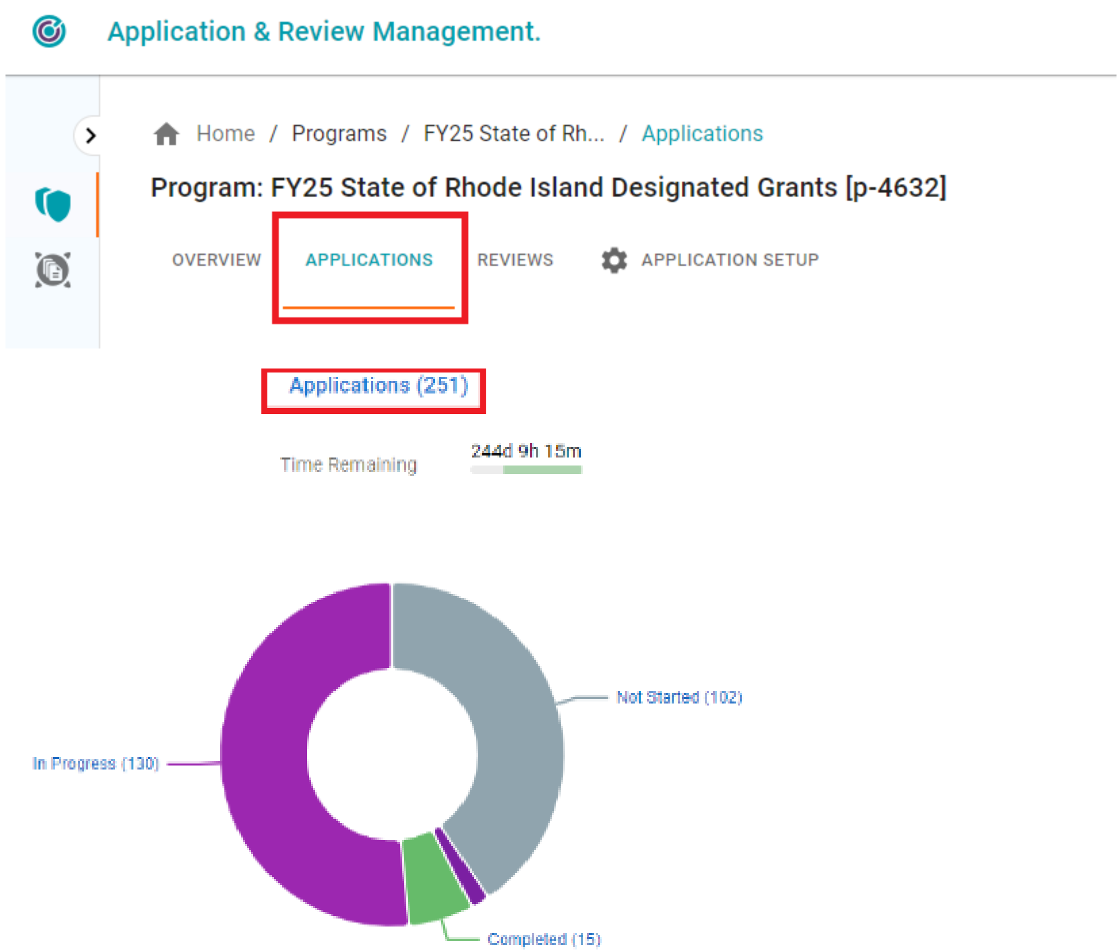
Once the Submission Stage has begun and applications are open, the grantor should monitor the application process in the Application and Review Manager (ARM).

6.1. Application Overview

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



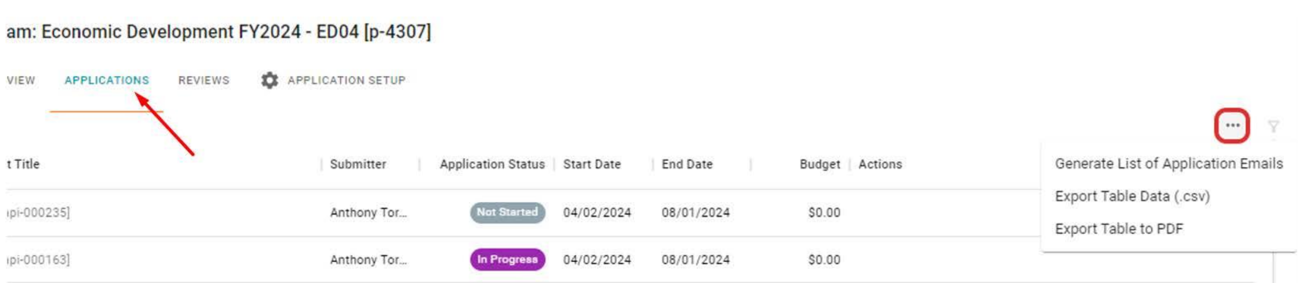
2) To view individual applications, navigate to the Applications tab on the Program Dashboard or select the Applications link on the pie chart.



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.



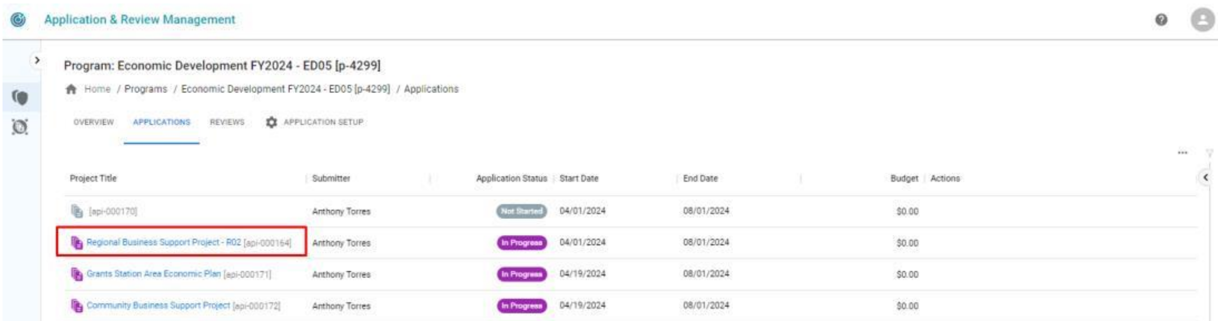
2) Generate List of Application Emails: Use this option to copy all applicant emails to another location

3) Export Table Data (.csv): Exports the application data to a .csv file.

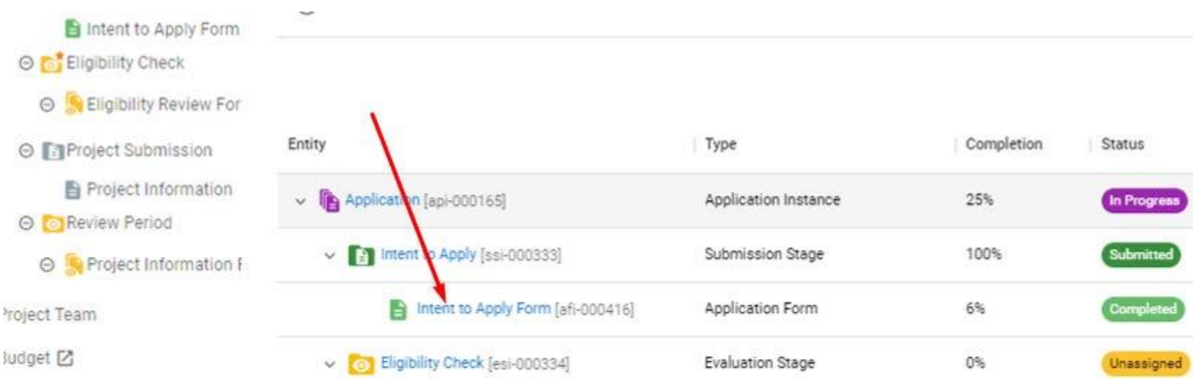
4) Export Table to PDF: Exports the application data to a PDF file.

Exporting a Completed Application Form

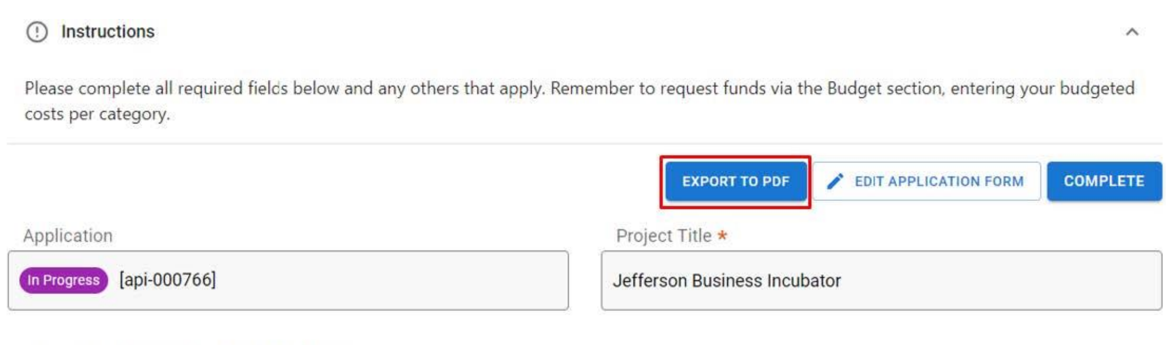
1) To export a PDF copy of a specific completed application form, open the Applications section and select a Project Title from the table.



2) Select the form name to view the completed form

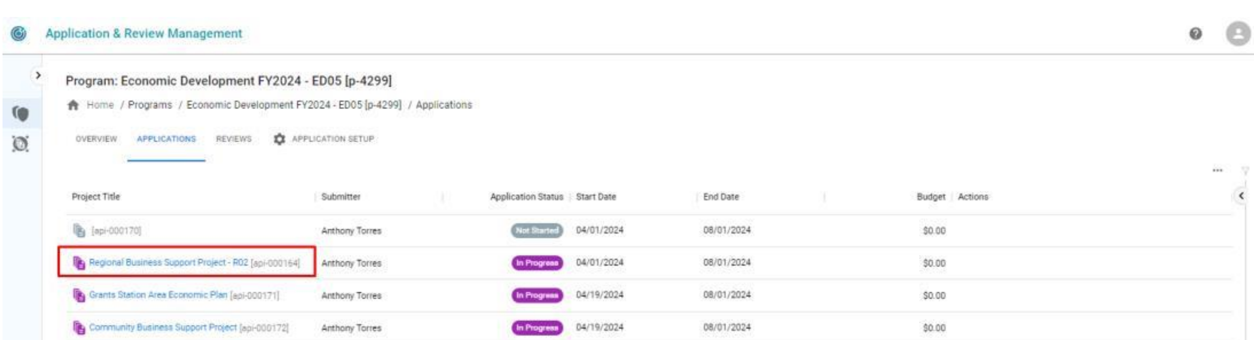


3) Select *Export to PDF*

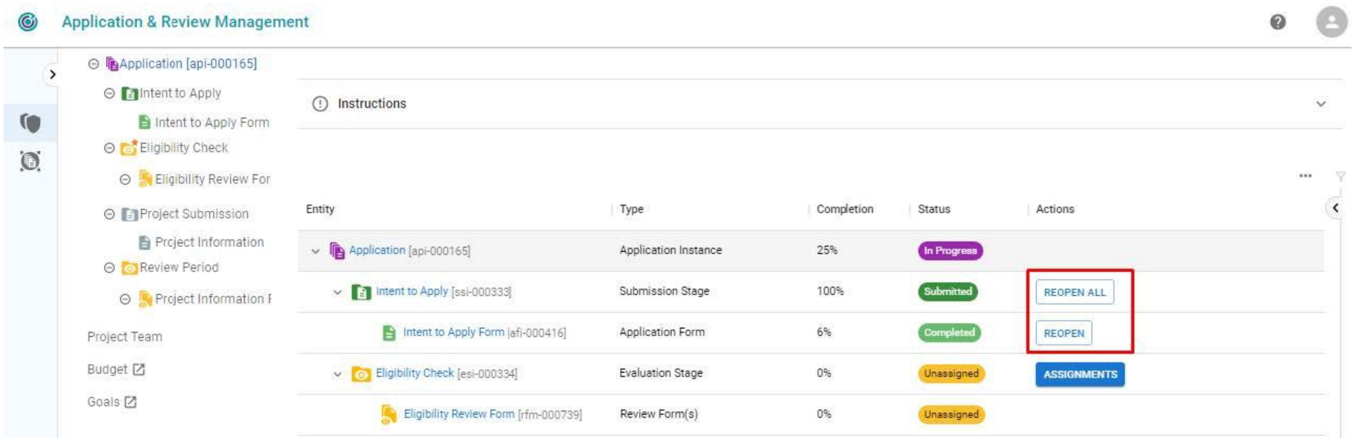


<u>6.3. Re-Open an Application</u>

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



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



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.

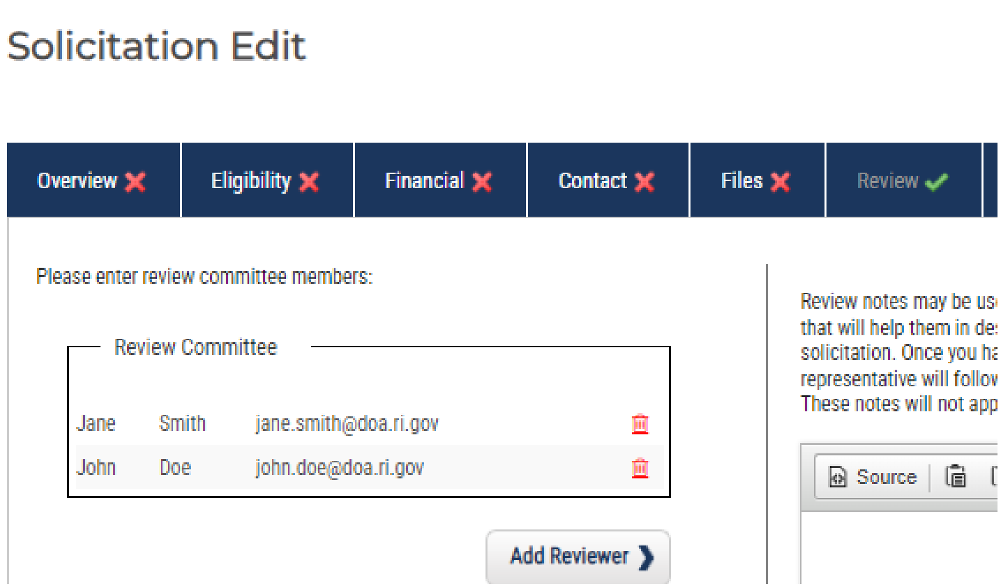
NOTE: Grantor agencies should not reopen applications after the submission window has ended without contacting the Grants Management Office for guidance.

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)



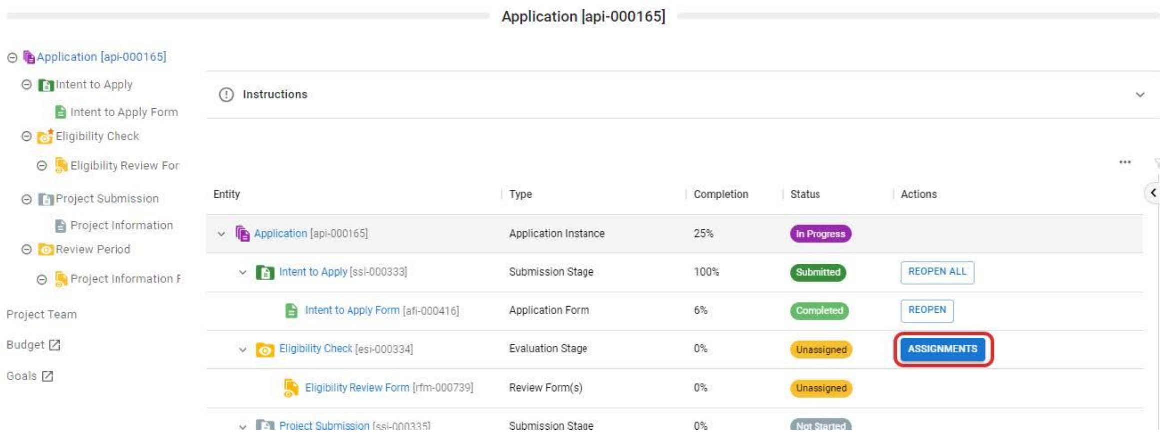
2) In ARM, return to the Program Page, "Applications" tab and choose how to assign reviewers.

a. By Application Instance: while viewing a specific application and assigning one by one.

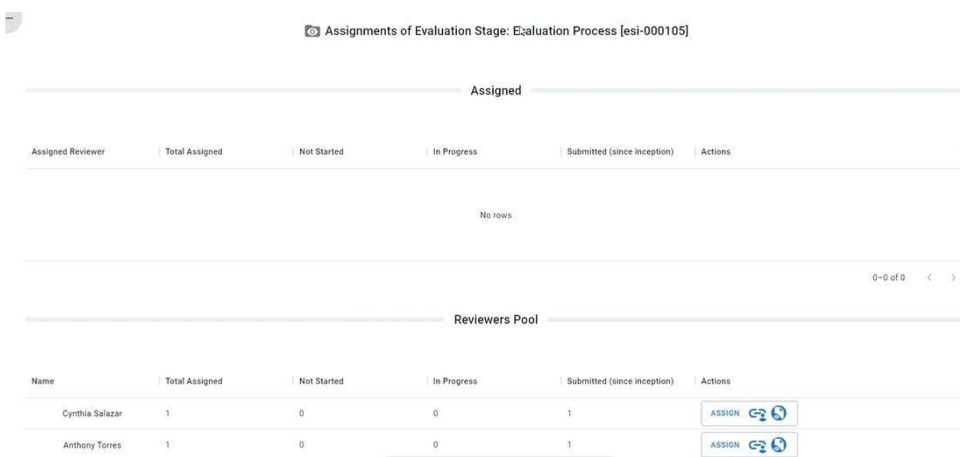
b. Bulk Assign: by selecting the “Reviews” tab above and using the Bulk Assign feature.

Assign Reviewers by Application Instance

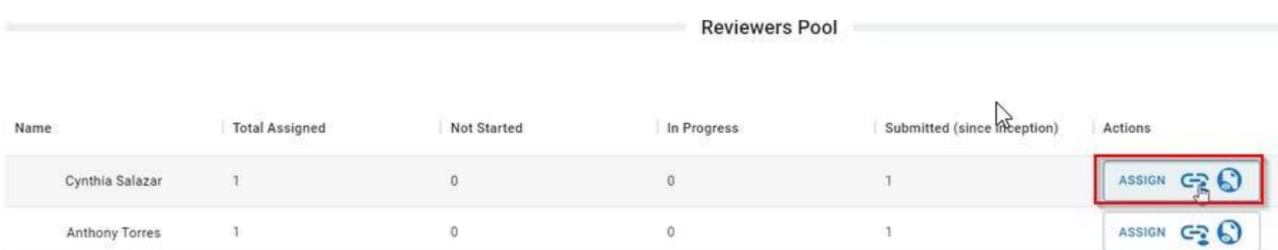
1) On the Evaluation Stage, select *Assignments* to assign reviewers.



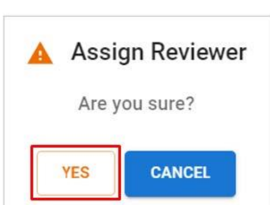
2) The Assignments of Evaluation Stage: Evaluation Process page will now open and will show who is assigned and who is listed on the Reviewers Pool.



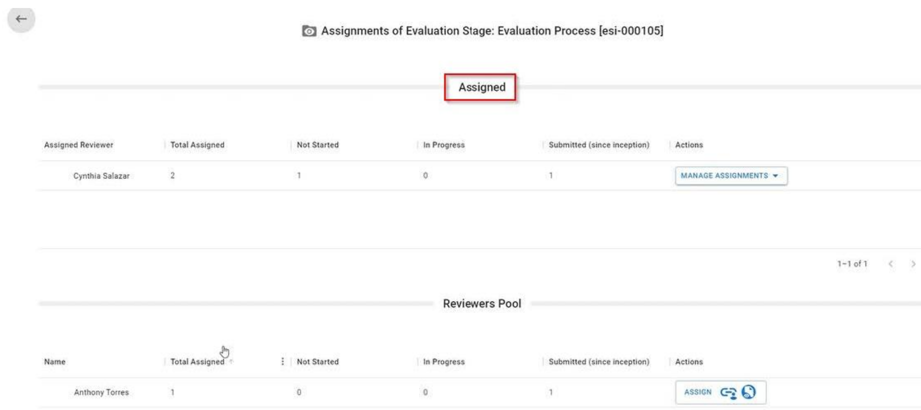
3) Select *Assign* next to each Reviewer that must complete Review Forms for this application.



4) Select *Yes* to confirm.



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

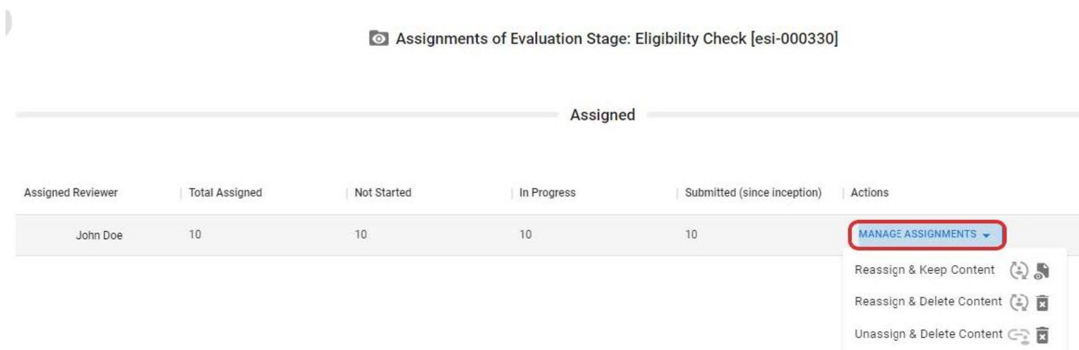


6) It is possible to now Manage Assignments for each Assigned Reviewer by simply selecting the Actions Column under the Assigned section of the table. There are 3 options as listed below.

   a. <u>Reassign & Keep Content</u>: Move the assignments and review form content to another Reviewer account.

   b. <u>Reassign & Delete Content</u>: Move the assignment to another Reviewer account but delete the review form content.

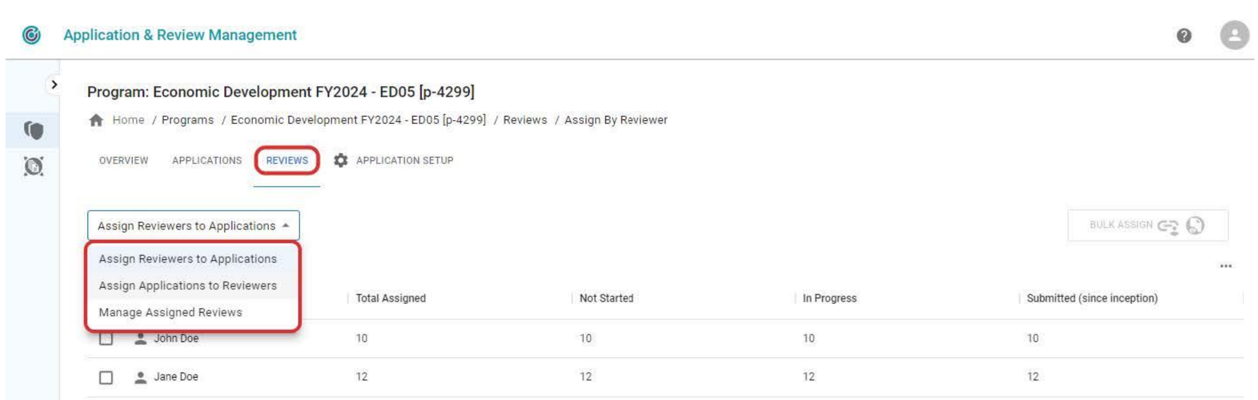
   c. <u>Unassign & Delete Content</u>: Remove the assignment from this Reviewer and delete any review form content created by this Reviewer



Assign Reviewers by Bulk Assign

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

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



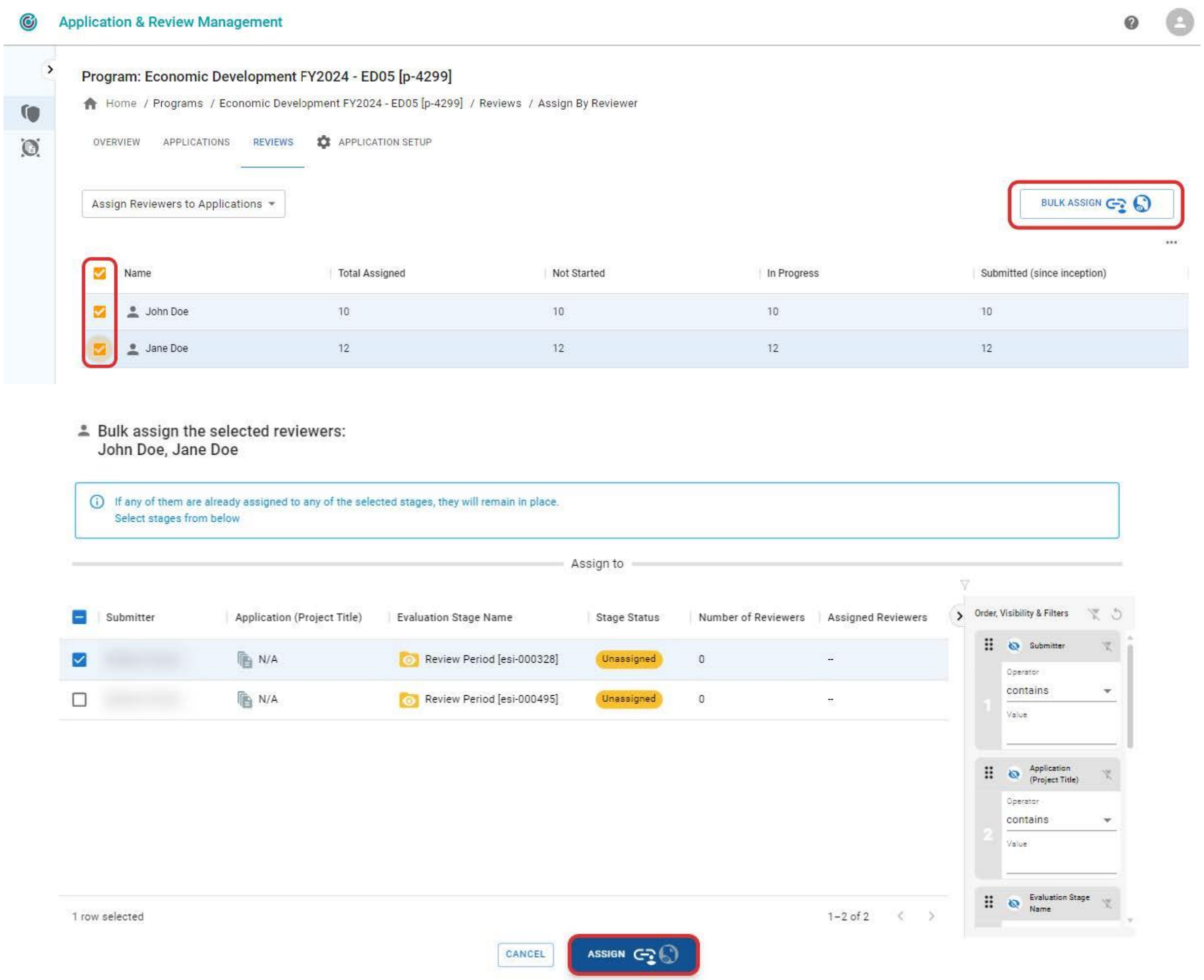
2) Assign Reviewers to Applications

   a. Select the Reviewer name(s)

   b. Select *Bulk Assign*

   c. Select from a list of Applications (provided they have Evaluation stages ready for assignment)

   d. Select *Assign*



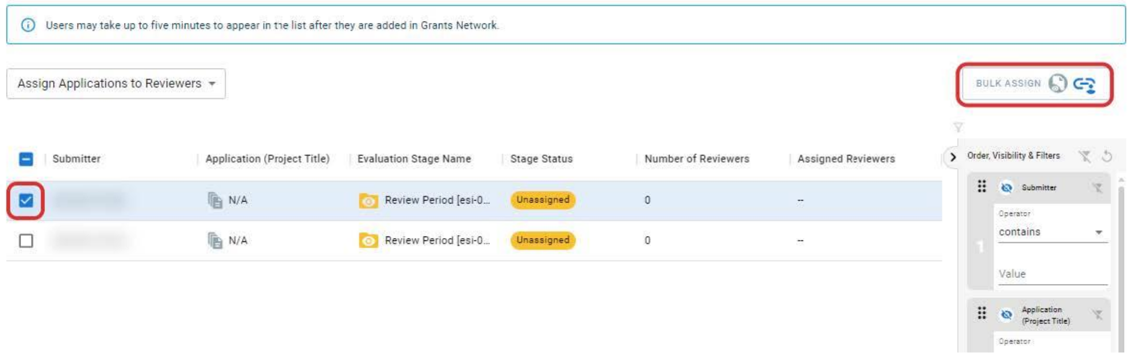
Assign Applications to Reviewers

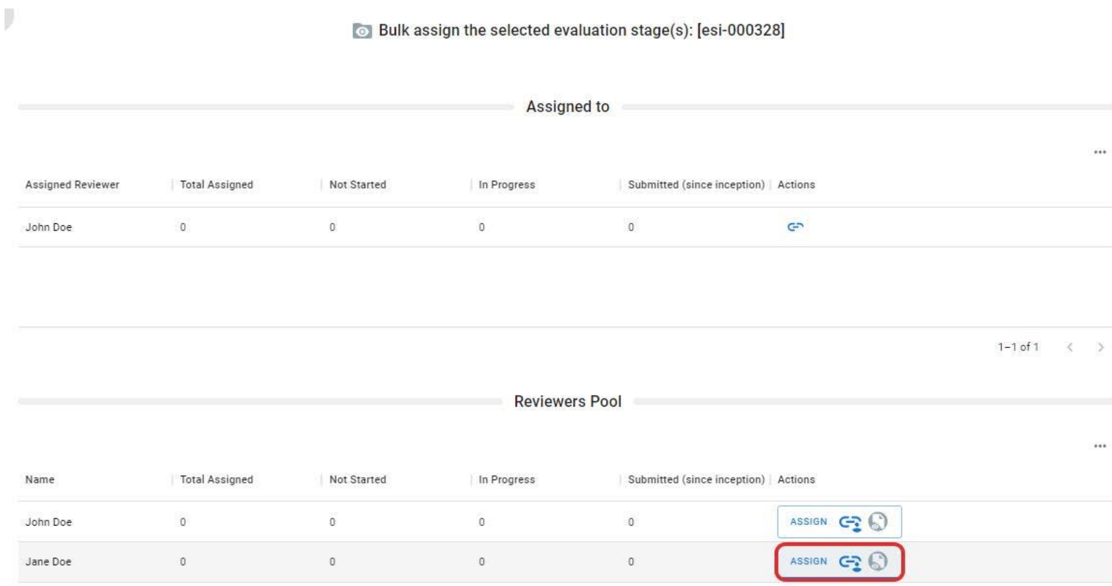
1) Select the Applications desired (provided they have Evaluation stages ready for assignment)

2) Select *Bulk Assign*

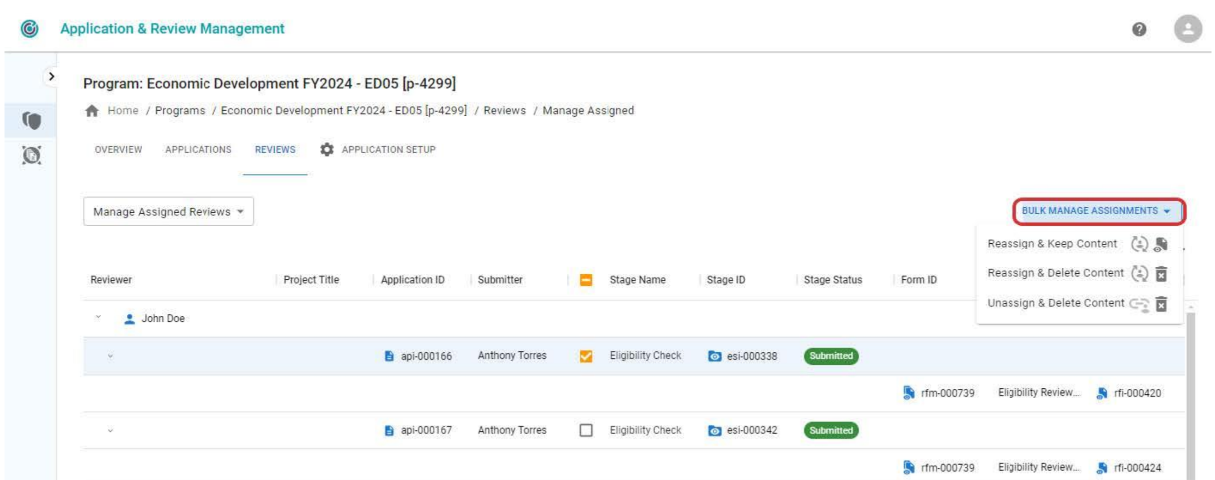
3) Select the Reviewer name(s)

4) Select *Assign*





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

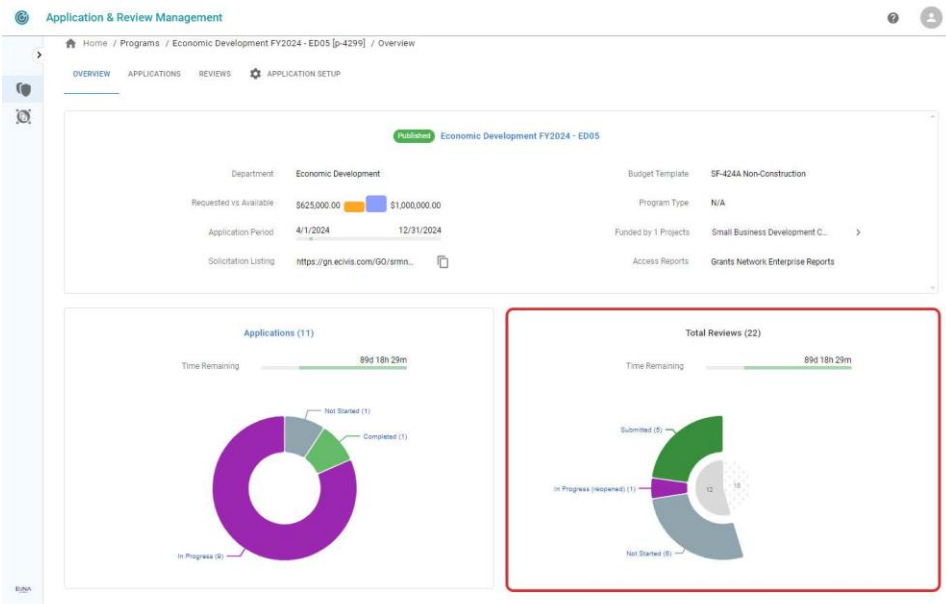


7.2. Monitoring Reviews

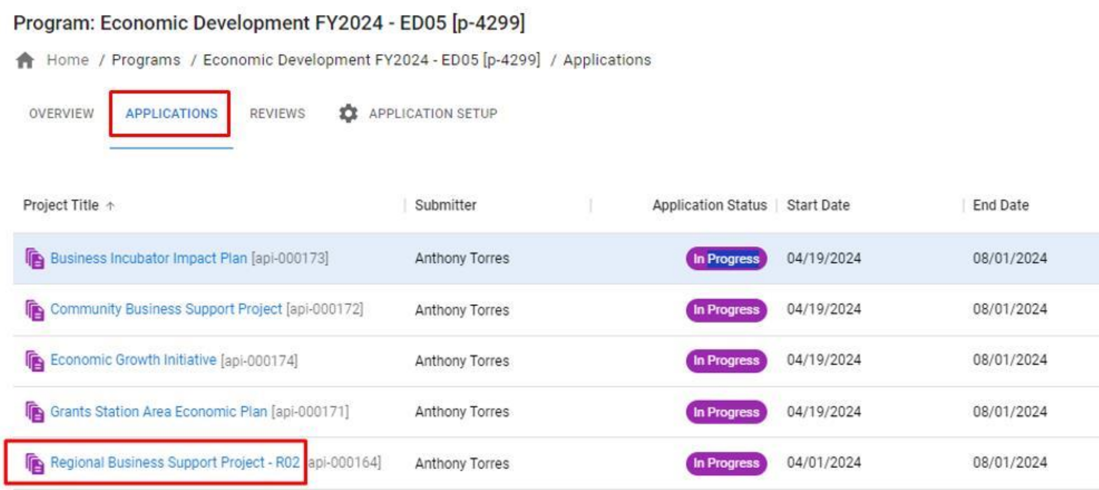
There are multiple locations where grantors can monitor the review progress.

Check Status of Reviews

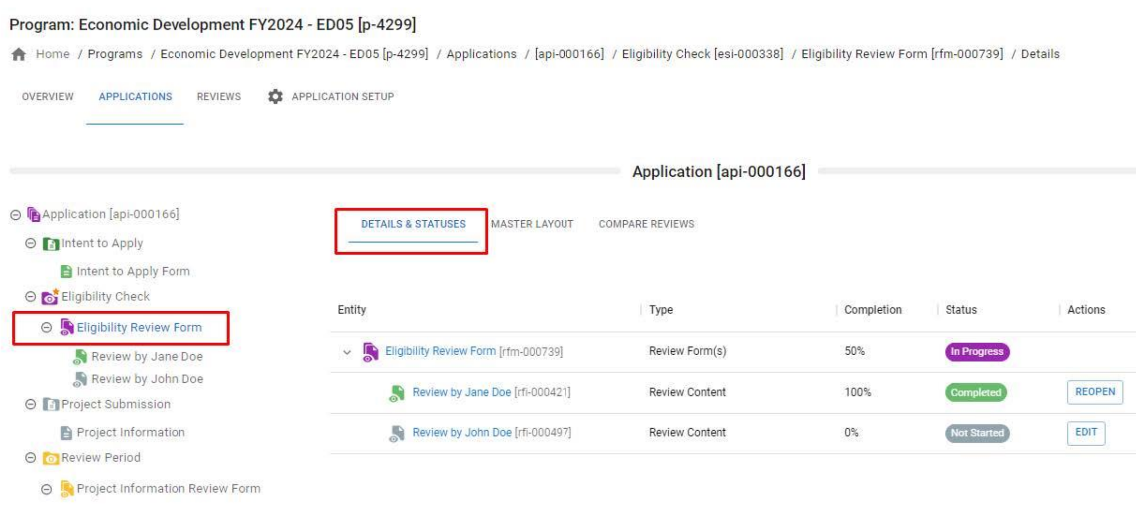
1) On the Overview tab for the program, use the Total Reviews chart to track the statuses and time remaining for all Reviews.



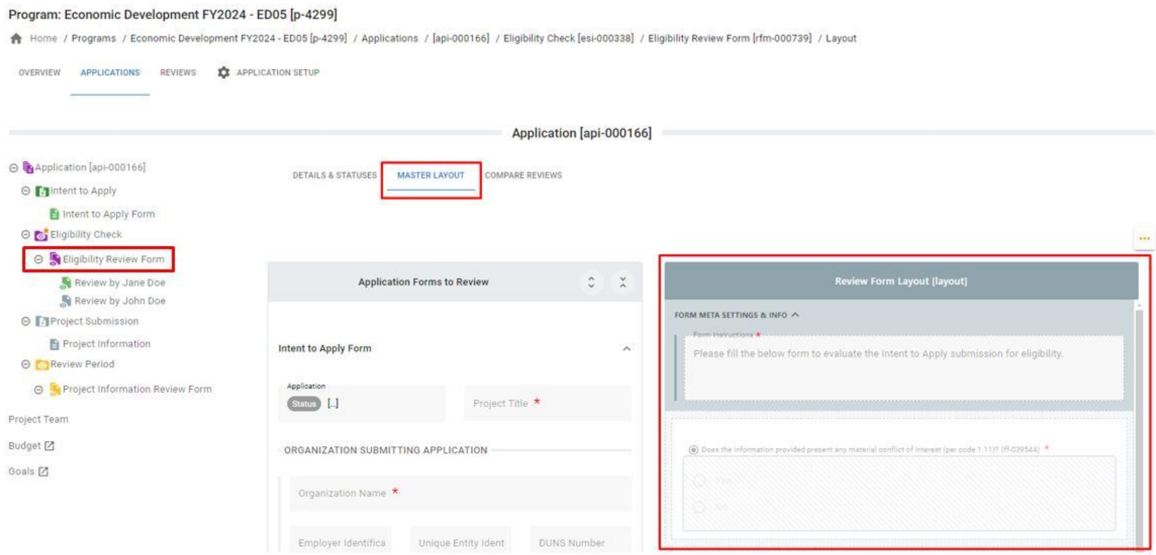
2) Select the *Applications* tab up above to open a specific Application and monitor the status of the Reviews.



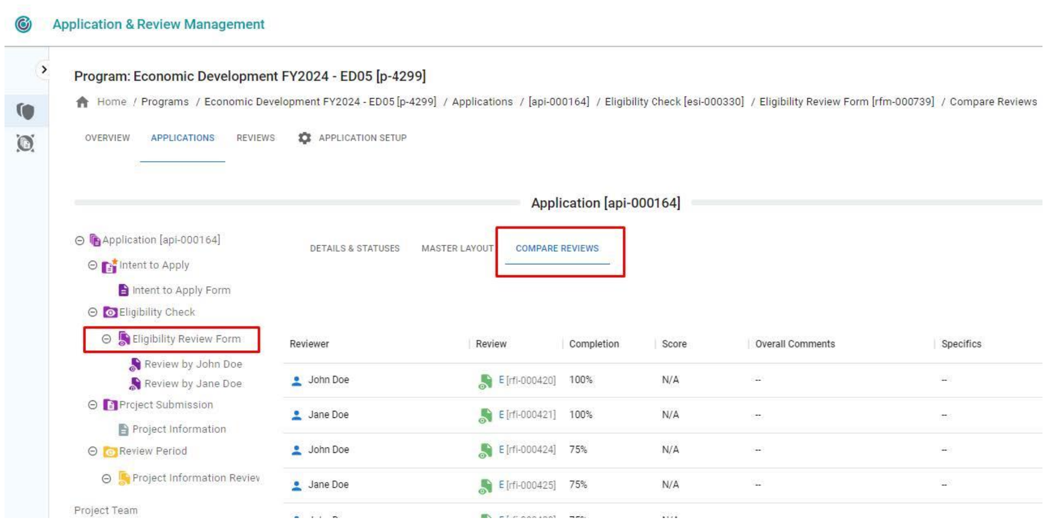
3) Select the Review Form in question using the navigation bar on the left. Next there is the "Details & Statuses" page with a breakdown of the status on all assigned Reviewers for this Application.



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

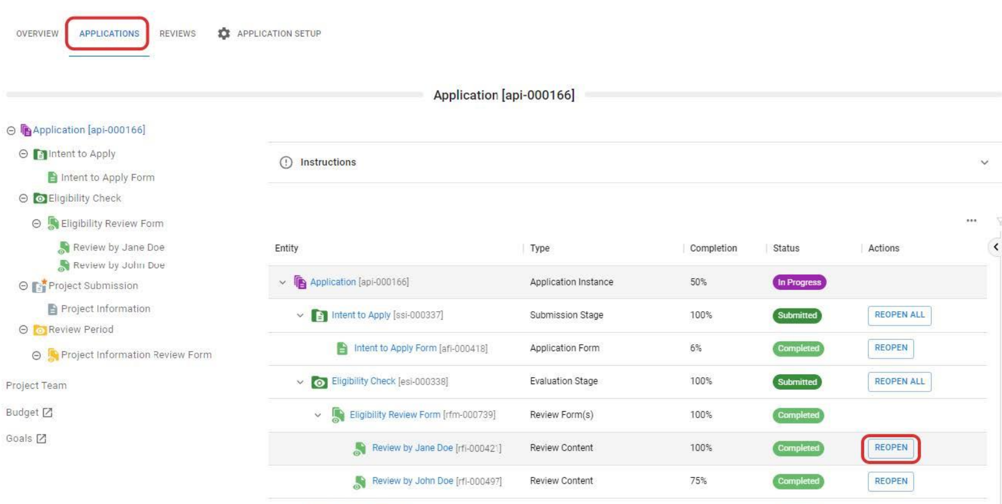


5) Select the *Compare Reviews* heading to view the status & details of reviews across all submitted applications within this Evaluation Stage.

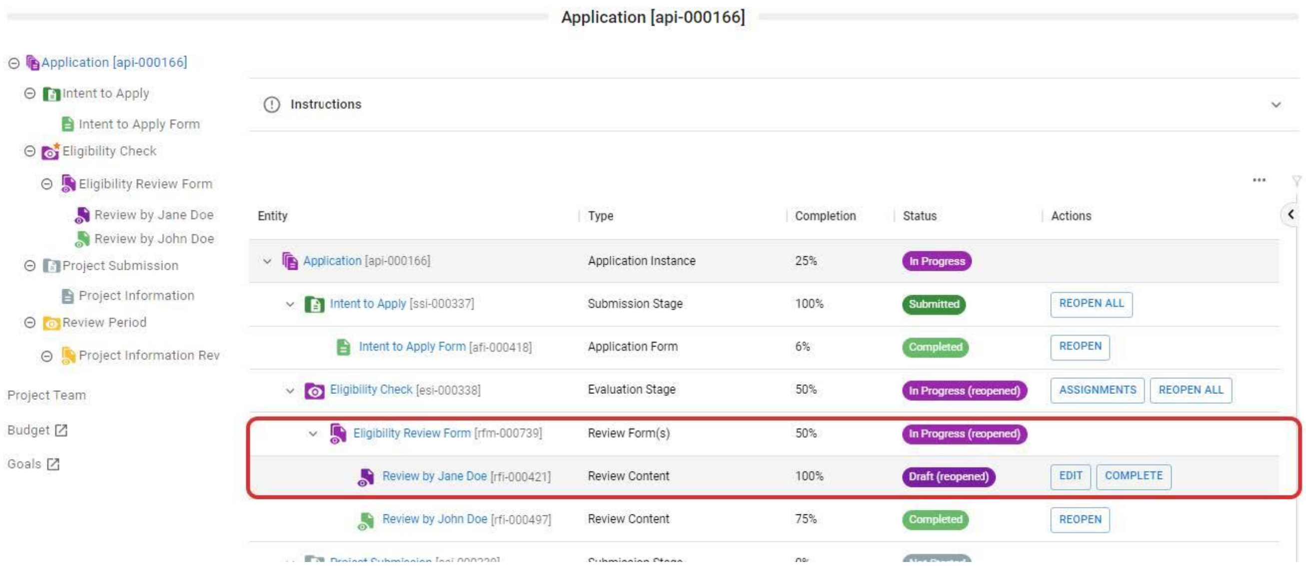


Reopen a Review

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*.



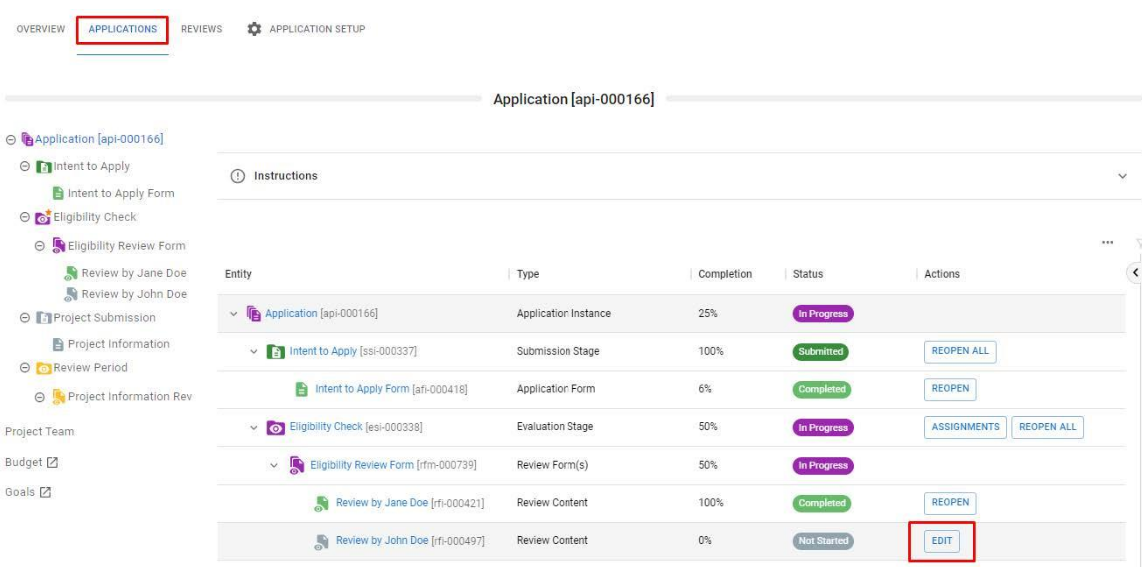
Phase 8: Completing a Review

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).

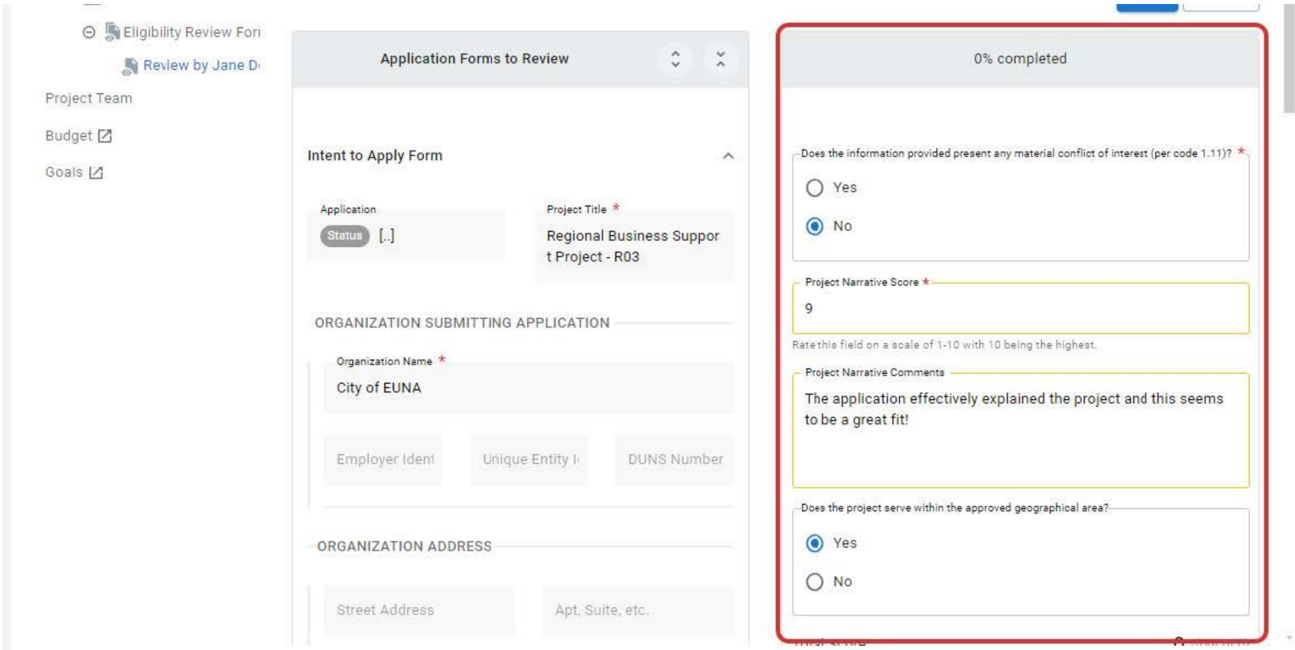
8.1. Completing Review Form in ARM (State Agency Users)

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

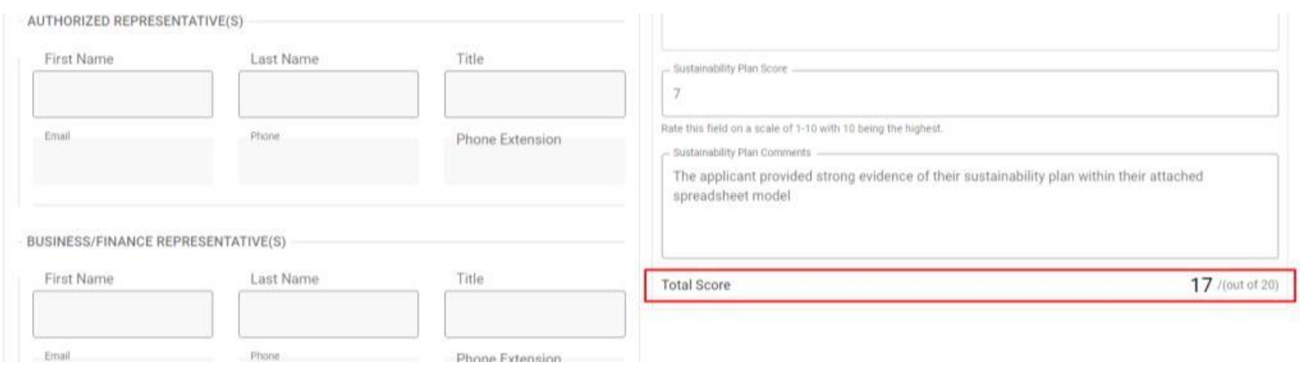
1) Access the Application and Review Manager and appropriate Program by following instructions in Phase 3 Section 2.
2) In the Applications tab, select *Edit* next to the Review Form assigned.



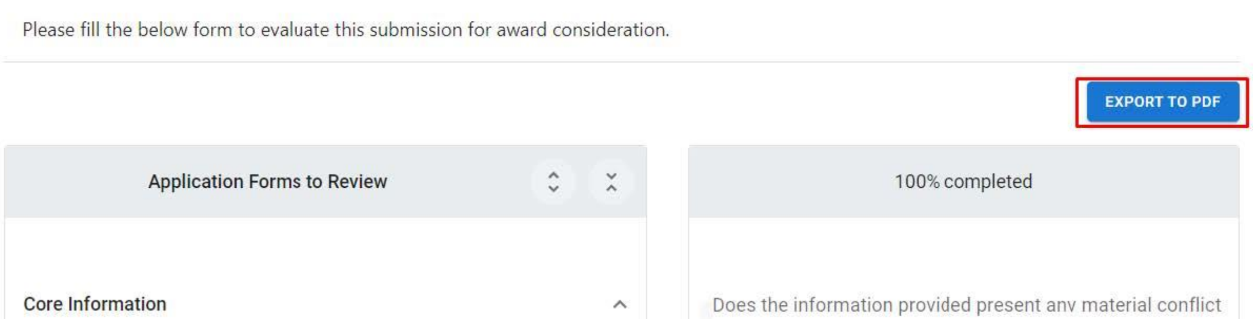
3) Viewing the "Application Forms to Review" on the left-hand side of the screen, Reviewers will provide feedback using the fields on the right.



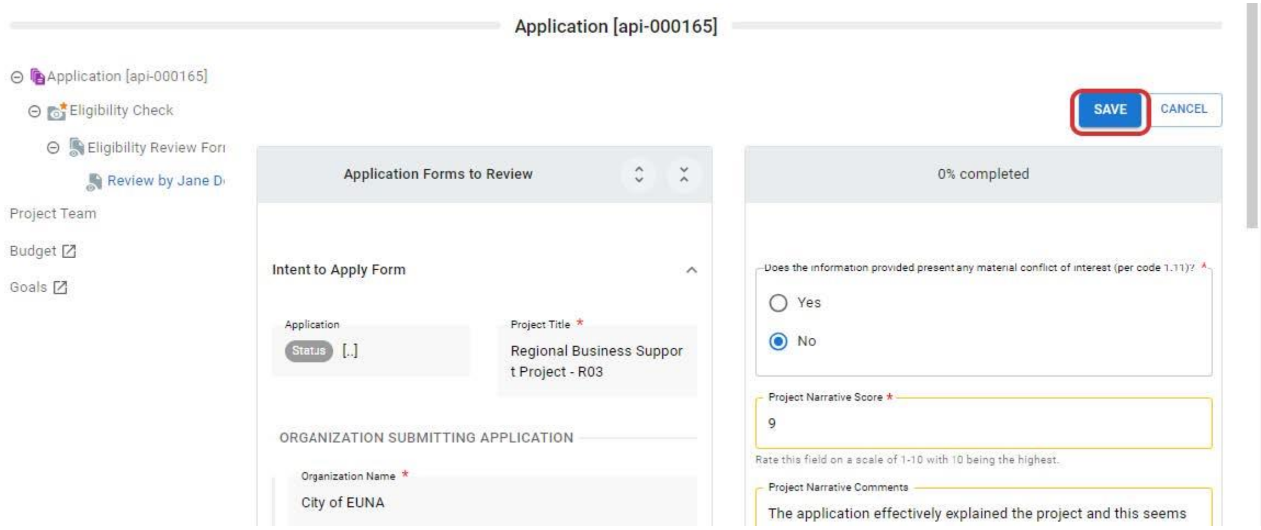
NOTE: If the Review Form is built with scoring fields that add up to a total score, there will be a "Total Score" value at the bottom of the form. Some Review Forms may not have a Total Score.



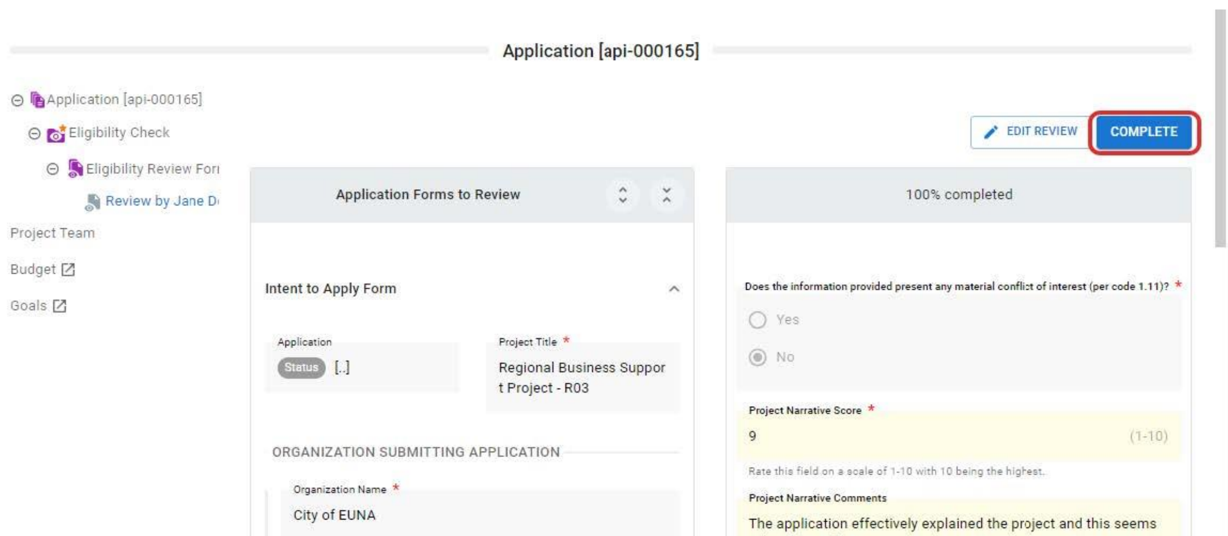
5) To export a copy of the filled Review Form to PDF format, select *Export to PDF* from the top-right corner of the page.



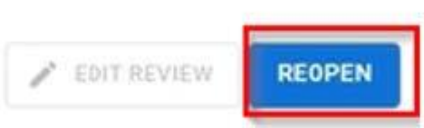
6) Once all required fields of the Review Form are complete, select *Save*.



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



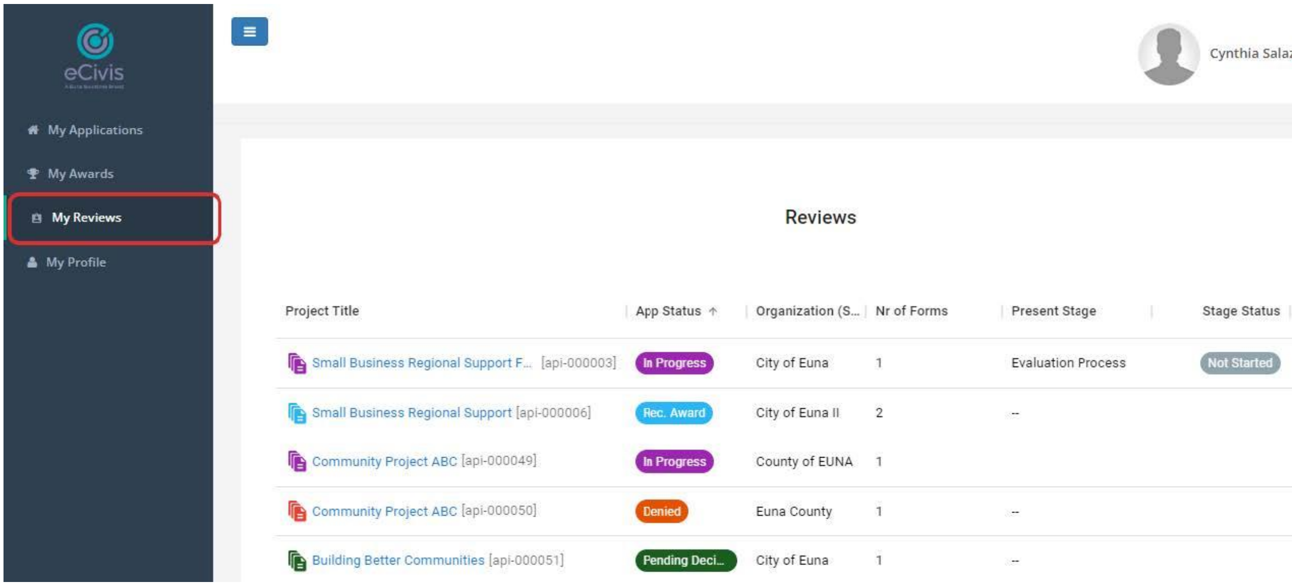
8) If further edits are needed after completing the review, select the *Reopen* button.



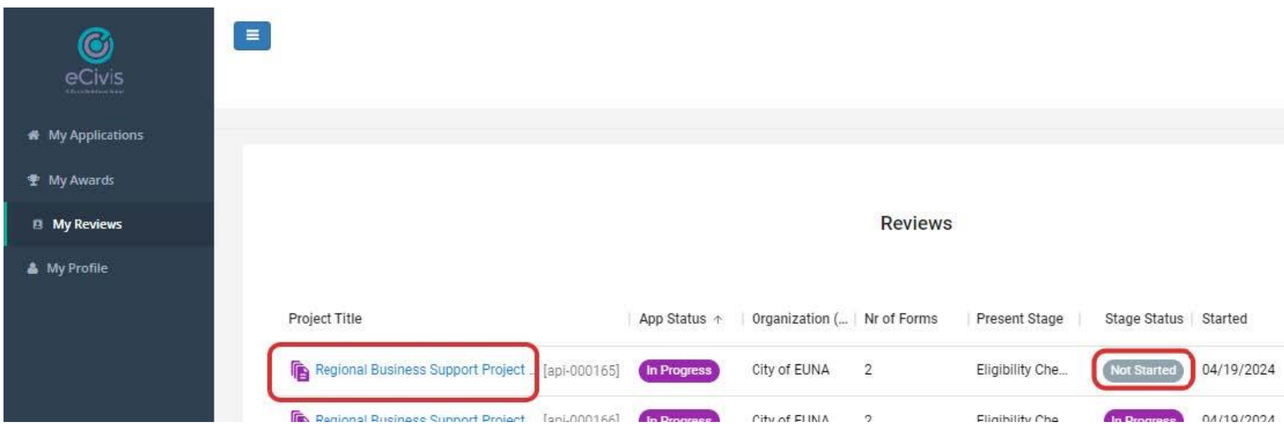
8.2. Completing Review Form in eCivis Portal (Non-State Agency Users)

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.

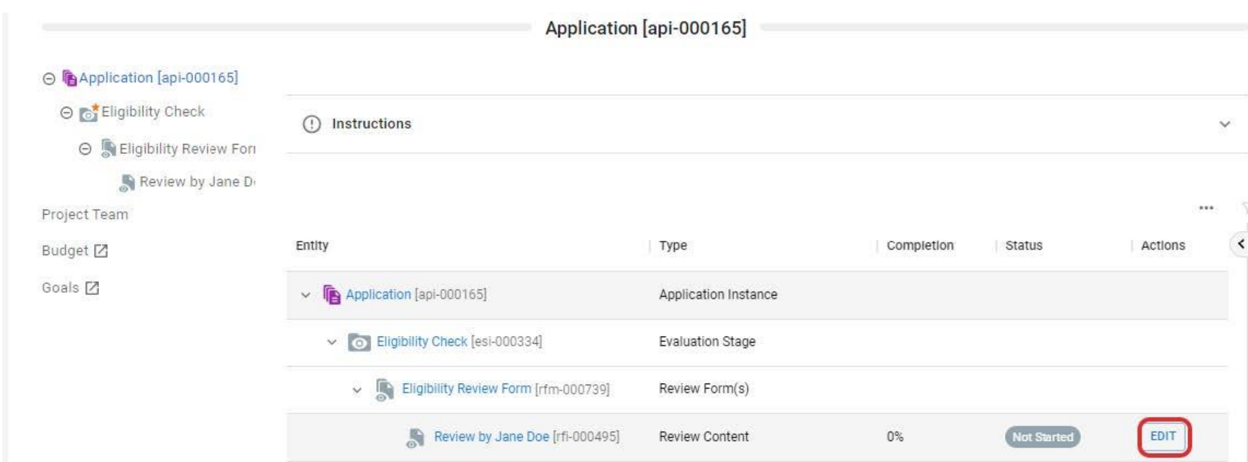
1) Once logged in to eCivis Portal (https://portal.ecivis.com), locate the My Reviews selection from the left-hand navigation bar.



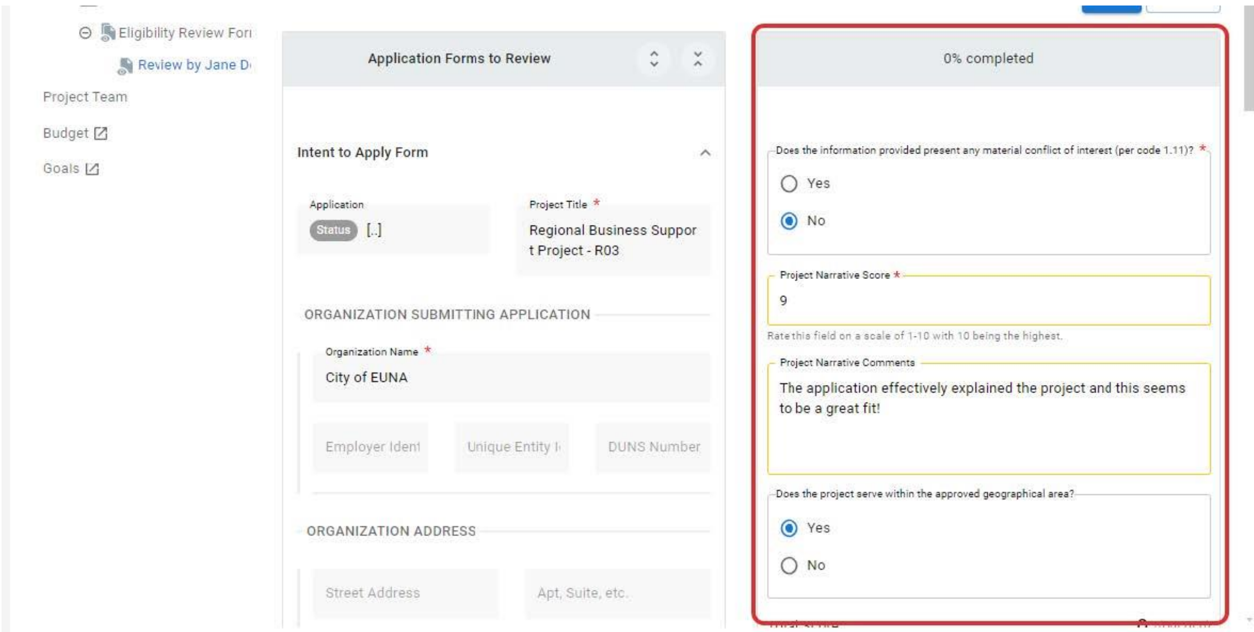
2) Select the appropriate "Application ID" to review. The stage status will show "Not Started" if review has not previously need started.



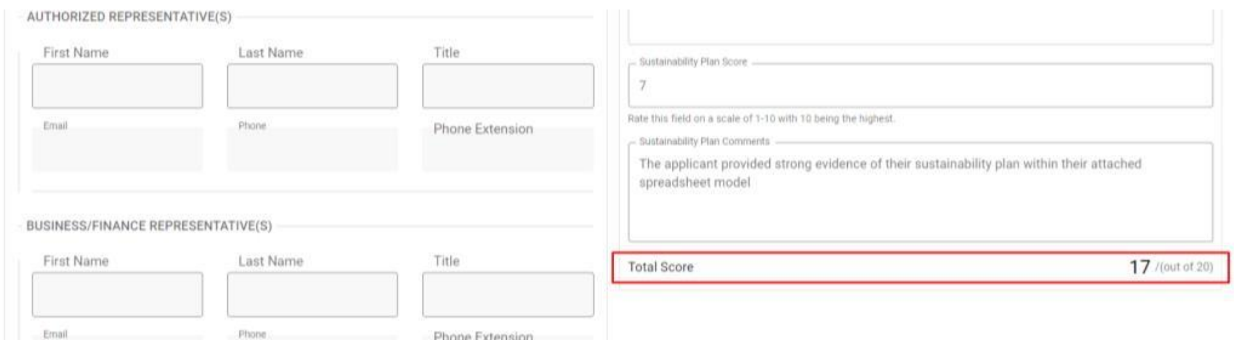
3) Select *Edit* next to the appropriate Review Form.



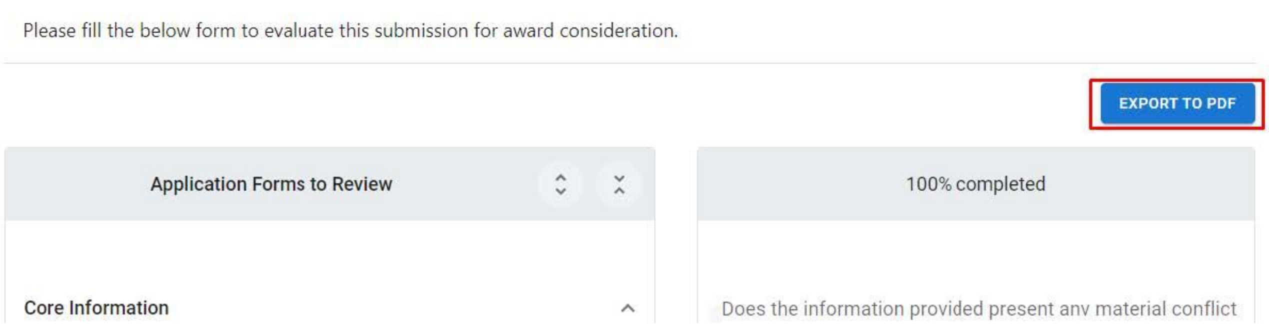
4) Viewing the “Application Forms to Review” on the left-hand side of the screen, Reviewers will provide feedback using the fields on the right.



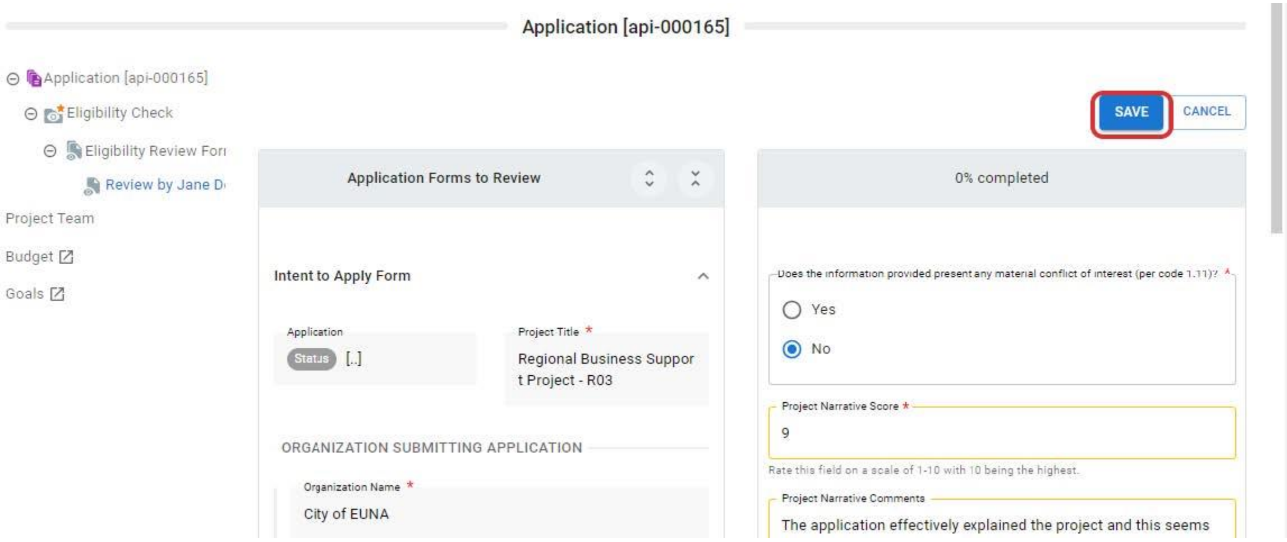
NOTE: If the Review Form is built with scoring fields that add up to a total score, there will be a “Total Score” value at the bottom of the form. Some Review Forms may not have a Total Score.



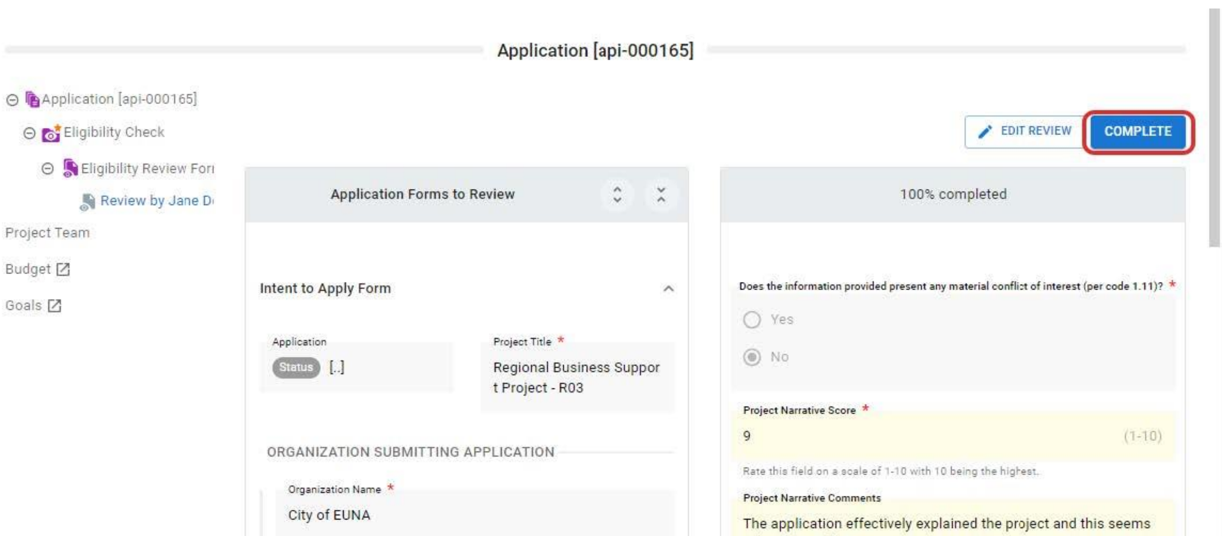
7) To export a copy of the filled Review Form to PDF format, select *Export to PDF* from the top-right corner of the page.



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



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

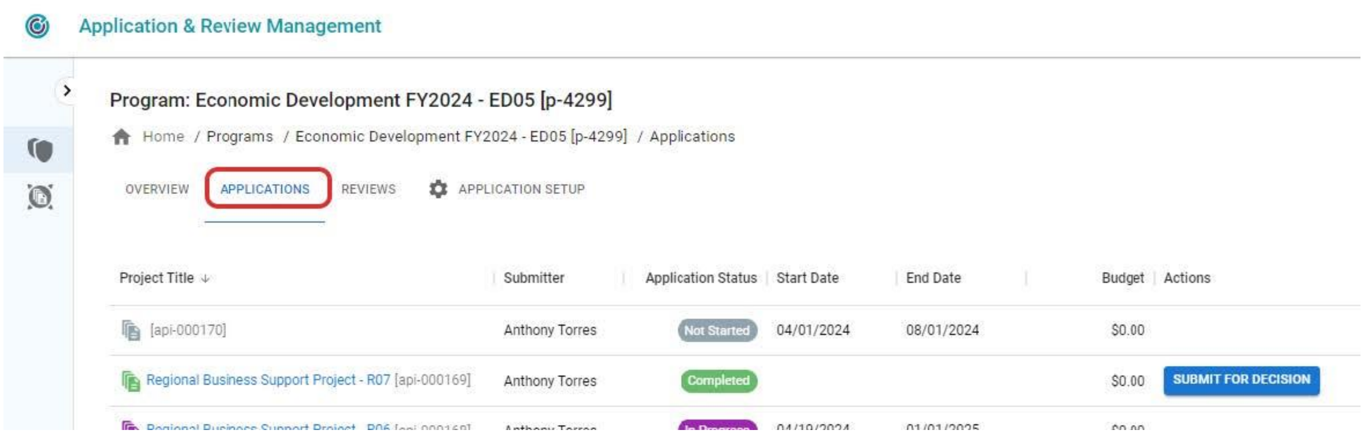


Phase 9: Award Recommendations/Denials and Final Award Approval

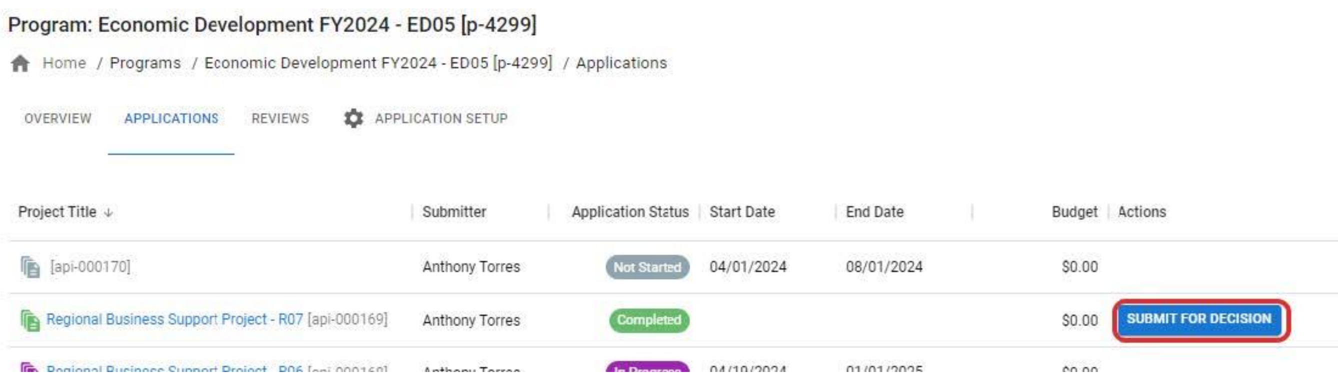
When the stages of the Application Process have been completed on any given Application (e.g. Reviewers finish submitting Reviews for the final Evaluation Stage), grantor agencies can begin making award decisions. Ensure reviews meet the minimum requirements as outlined in the State Regulation.

9.1. Making Award Recommendations and Denials in ARM

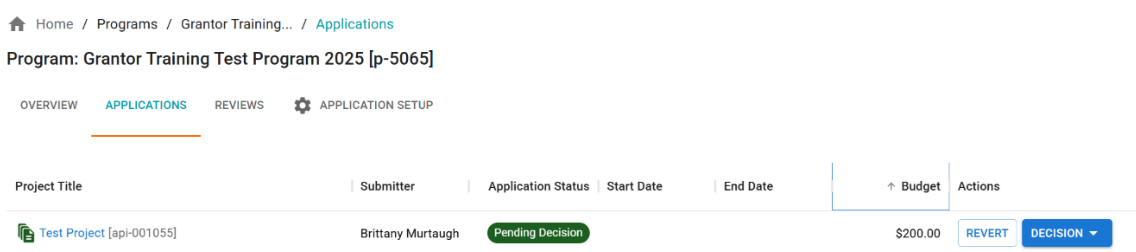
1) Once reviews are complete, a *Submit for Decision* button will appear next to the Application title when viewing the Applications page.



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



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

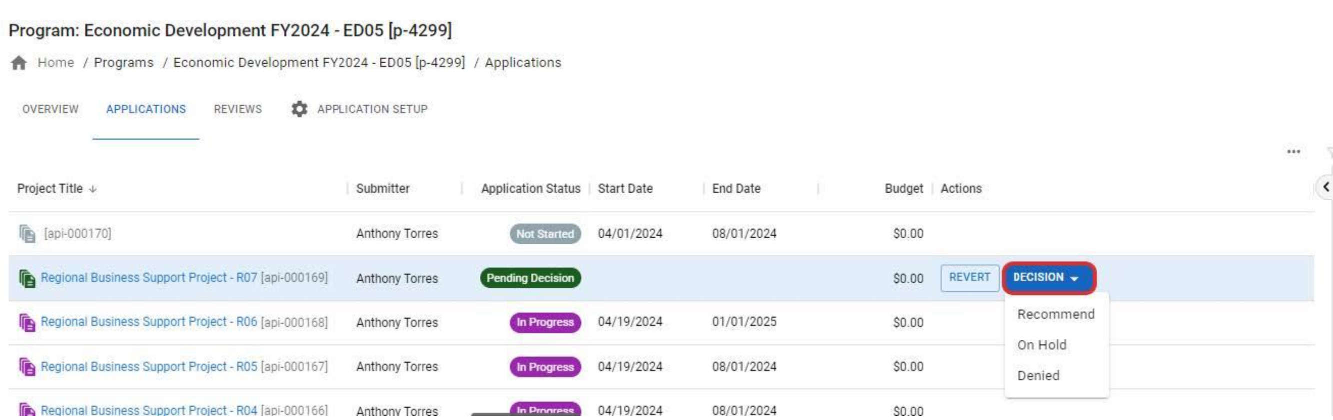


4) Next, three options will be available to make a decision on the application:

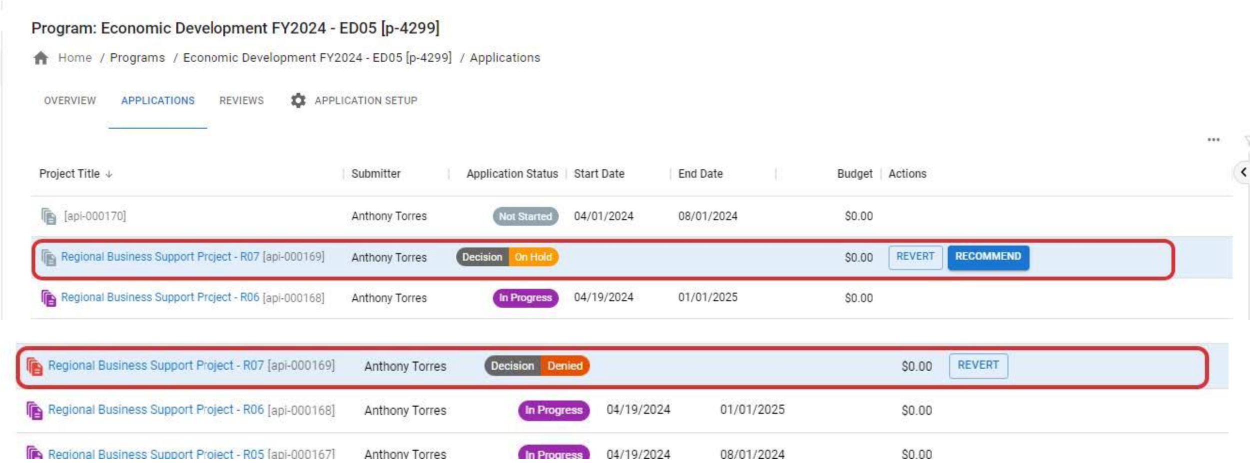
a. Recommend: Applications that will be awarded. Initiates transfer to Grants Network.

b. On Hold: Can return to these applications at a later time to update the status.

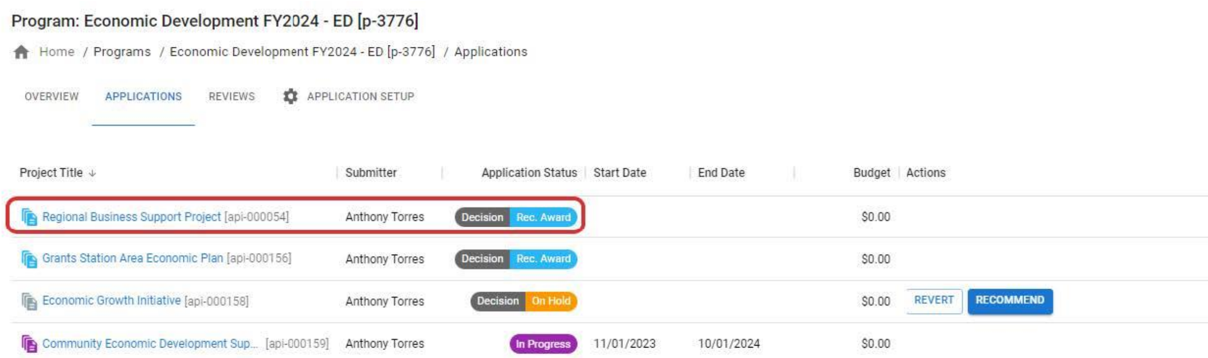
c. Denied: Applications that will be denied.



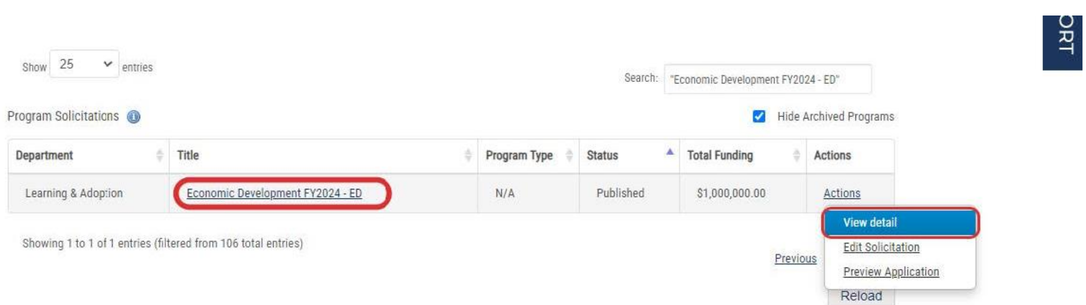
4) Applications marked as “On Hold” or “Denied” can be returned to a prior stage by selecting *Revert* if the application status needs to be changed.



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 accidently marked as “Recommend”, contact the GMO for assistance.



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.



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.

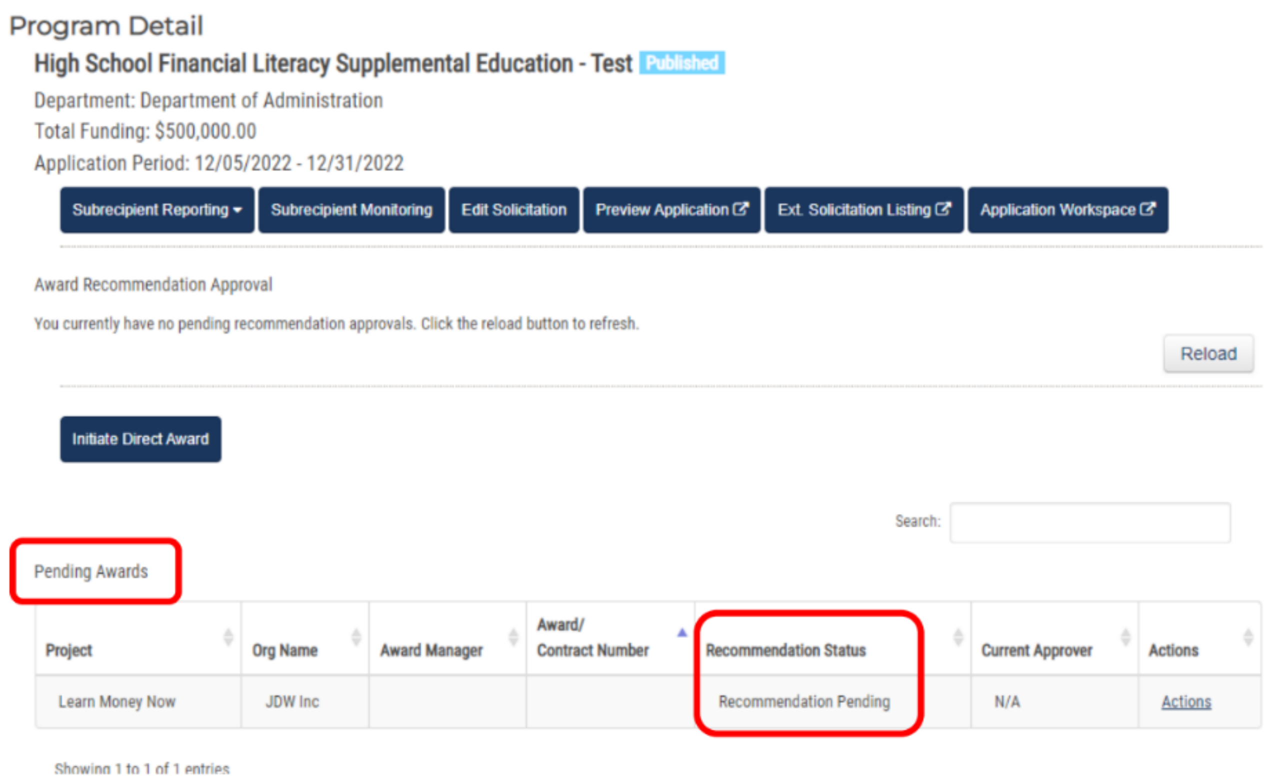
9.2. Creating Award Recommendation in Grants Network

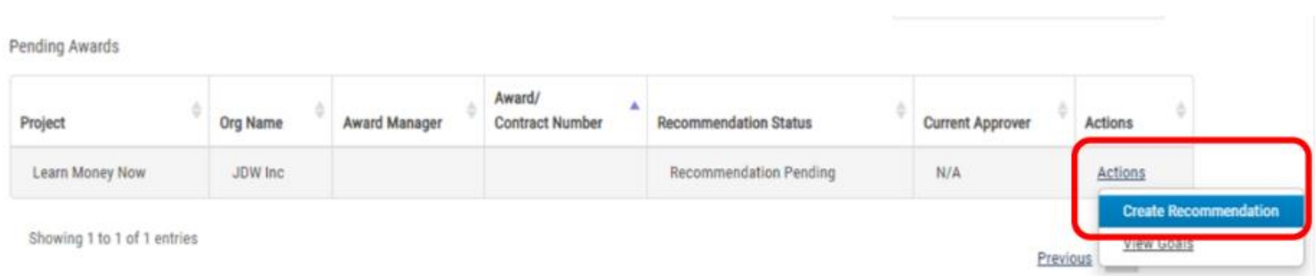
Now that the application has been marked as "Recommend" in ARM and is appearing on the Pending Awards table on the Program Dashboard in Grants Network, the grantor can create the award recommendation. Please note the required Subaward Agreement and corresponding attachments will need to be uploaded as 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.





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.

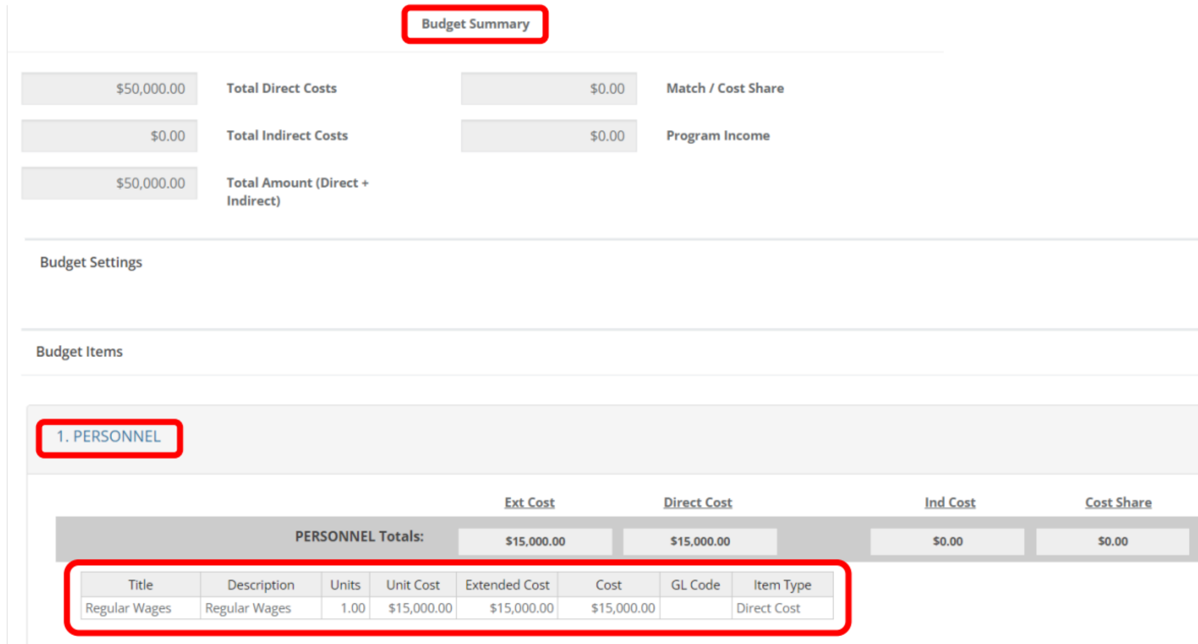
l. Performance Period Start: – The start date of the subrecipient's performance period. This information should match the performance period start date on their respective subaward agreement.

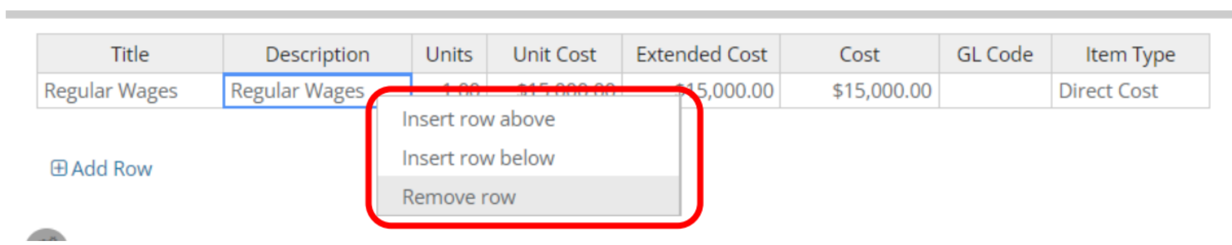
m. Performance Period End: – The end date of the subrecipient's performance period. This information should match the performance period end date on their respective subaward agreement. If needed, this date can be edited in the post-award stage by the grantor or the subrecipient through an amendment.

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.

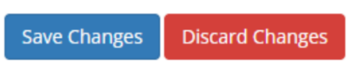
2) When the budget opens, review and make changes, if needed, to finalize the award budget. The Budget Summary section at the top of the page will show the total request amount from all budget categories. Selecting the hyperlinked budget category title (i.e. Personnel) will open the category to view 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.



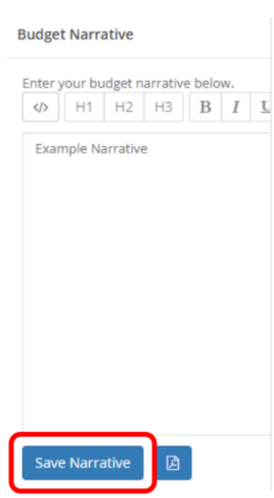


NOTE: In the post-award stage, subrecipients will only be able to request funding in the budget categories that they were awarded. Funding can be moved between budget categories in the post-award stage using the amendment functionality.

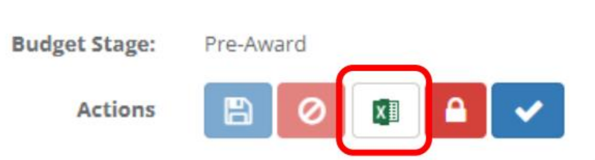
3) Once all necessary changes to the budget have been made, scroll down to the bottom of the page and select *Save Changes*.



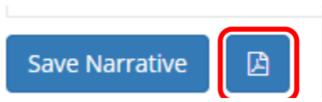
4) **NOTE**: If needed, the submitted Budget Narrative section can also be edited. If any changes are made, select *Save Narrative*.



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.

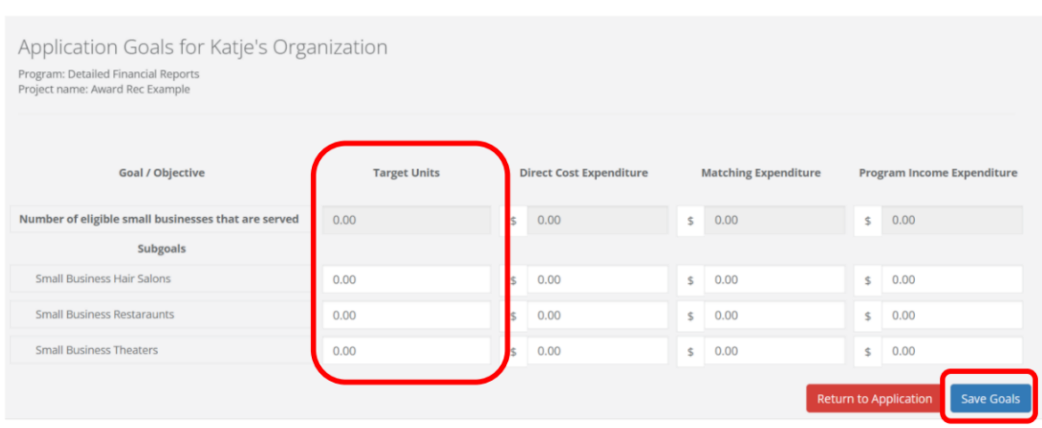


7) Once the changes have been made and saved, exit out of the browser tab. Once closed, it will return to the tab with the Award Recommendation Task. A pop-up asking for confirmation that the budget is done being edited will appear. The page will automatically update the award total amount. Select *Done*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

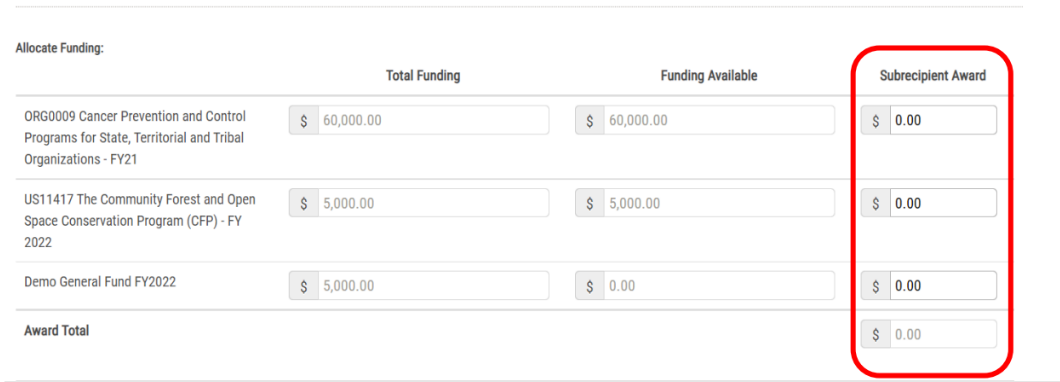


NOTE: This option will not appear if no Goals were created in the Solicitation.

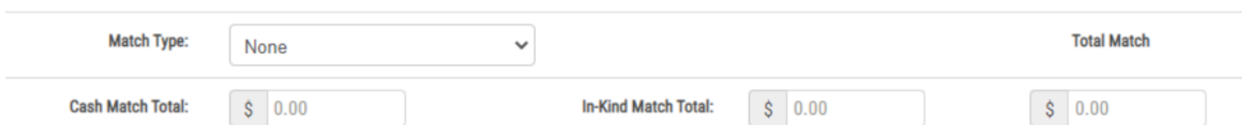
Allocate Funding

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.

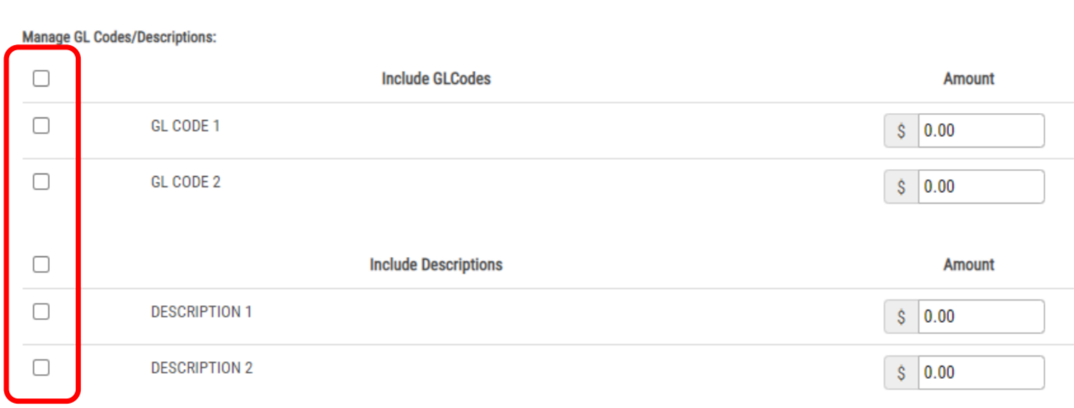
1) Scrolling down the page, the Allocate Funding table will show all available funding sources to fund this award. Fill out the table to determine what funding sources will be used for this award.
   NOTE: The "Award Total" must match the "Total Budget Requested" amount. If these two do not match, an error message will appear.



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.



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.

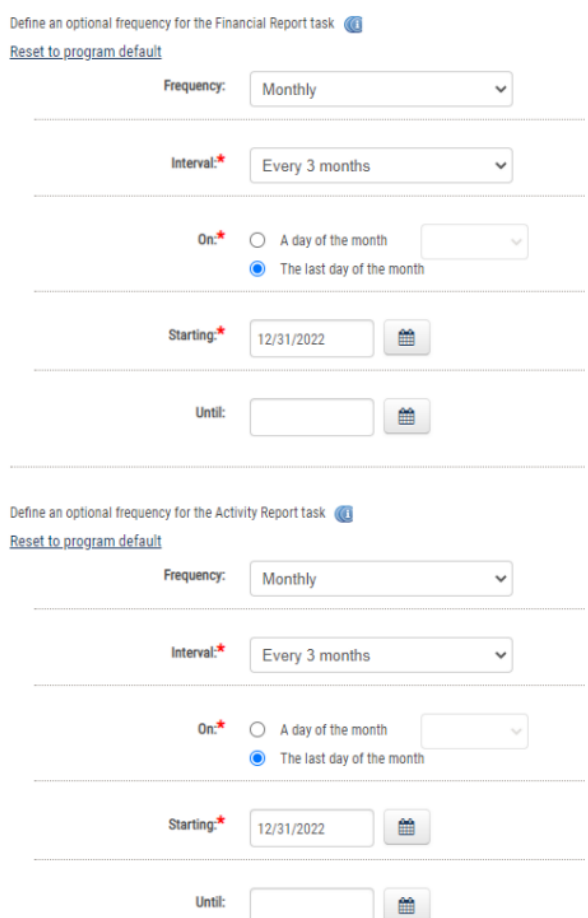


NOTE: Grantor will select these options for each intended subrecipient. Based on these selections, the subrecipient will be able to view and select from them when submitting Financial Reports/Payment Requests in the post-award stage. The amounts entered in the Amount column do not impact the subrecipient 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

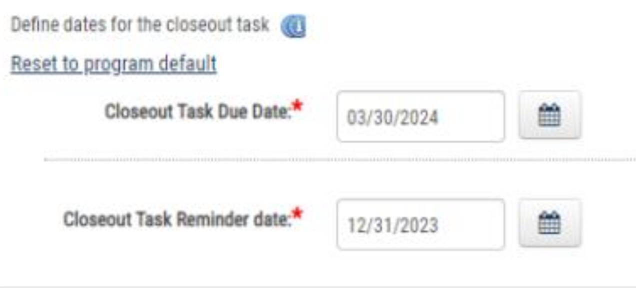
The next section of the Award Recommendation Task is defining the reporting frequency for the subrecipient. If a reporting cadence for Financial Reports and Activity Reports was entered in the Approval tab of the program solicitation, reporting cadences will auto populate, but can also be edited.

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.



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.

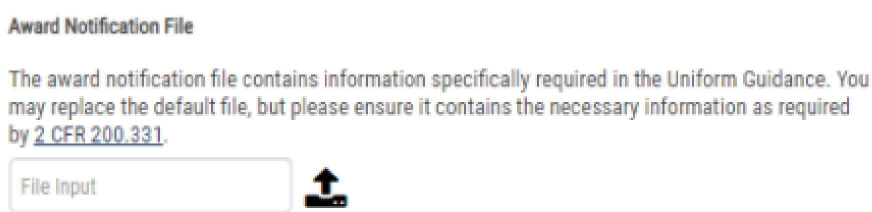
3) After selecting reporting frequency (optional), the grantor should define dates for the subrecipient closeout task. This task is to remind subrecipients to submit their final closeout task (final financial report) to officially close their award.
4) The dates in these fields auto populate based on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



Files and Notes

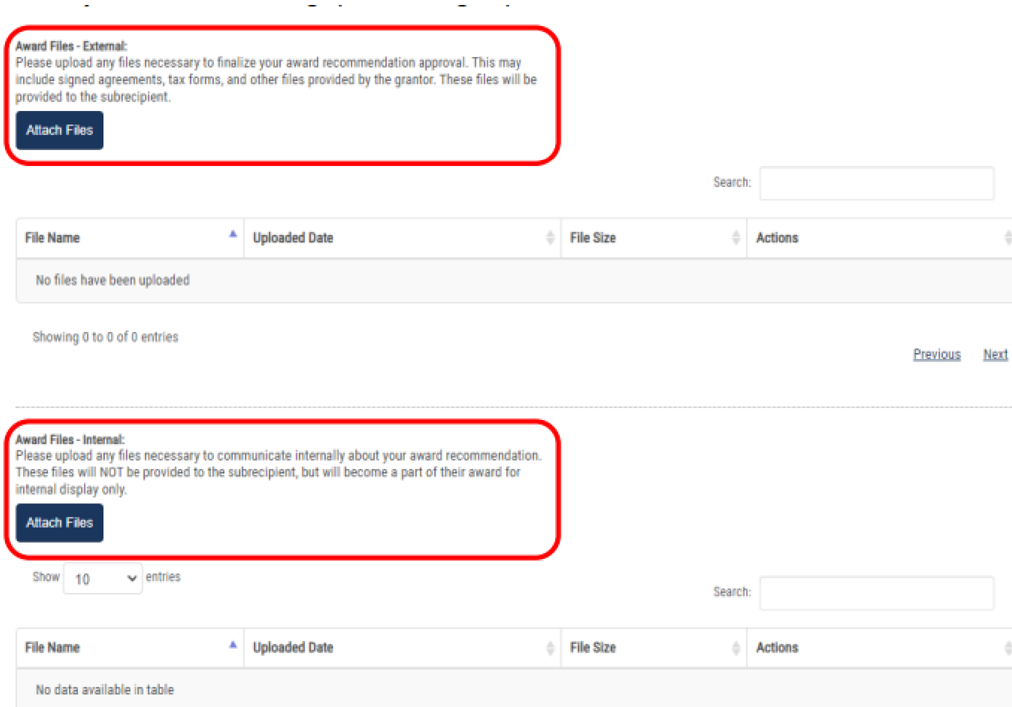
This section includes award notification language and the upload of required documents as part of the award recommendation process.

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.



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.



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.

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

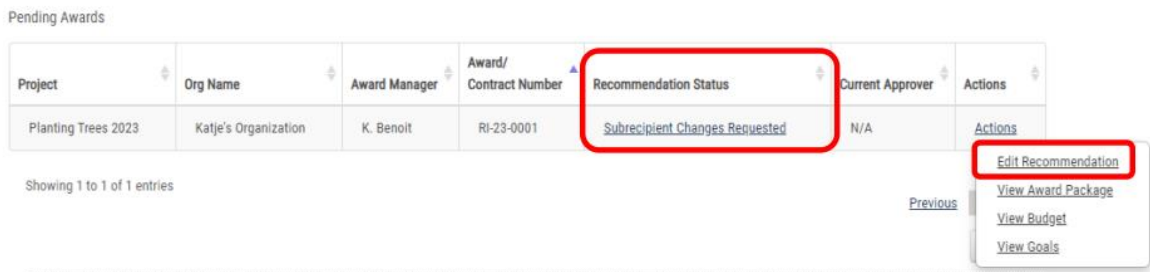
Project	Org Name	Award Manager	Award/ Contract Number	Recommendation Status	Current Approver	Actions
Planting Trees 2023	Katje's Organization	K. Benoit	RI-23-0001	Pending Recommendation Approval	Katje Benoit	Actions

5) Follow the approval workflow as demonstrated in Appendix H.

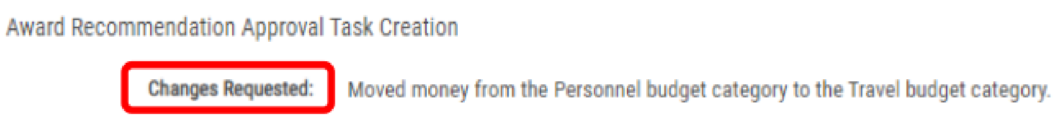
6) The last step in this process is the Final Award Approval. Once the award package has been approved and sent to the subrecipient, they can then review the package and take action, including accepting the award, requesting changes to the award, or declining the award.

   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.



      ▪ 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.



      ▪ 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.

Completing Final Award Approval Workflow

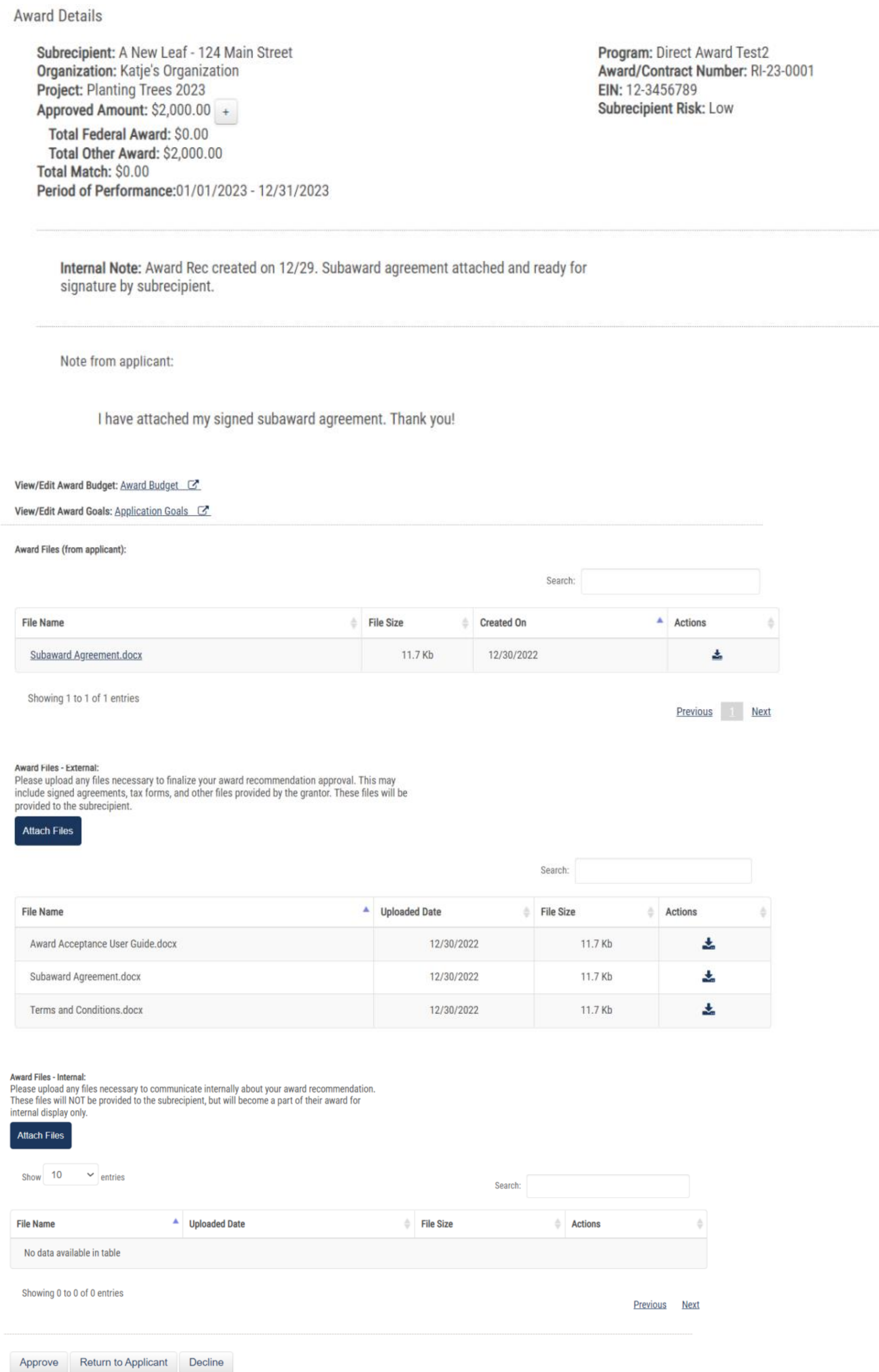
This is the final step to move an applicant to become a subrecipient. Follow the steps below to complete the Final Award Approval Workflow to complete the awarding process.

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 10 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.

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

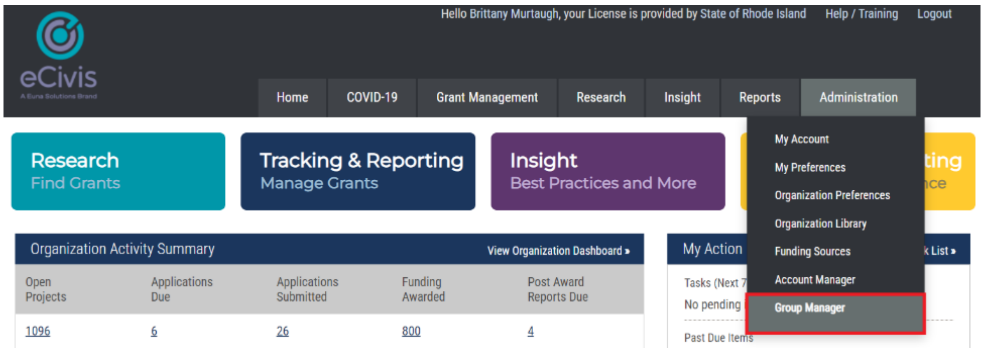
The Pre-Award process is now complete. Please see the Grantor Post-Award User Guide for all post-award activities.

Appendix A: How to Create User Groups for Approval Workflows

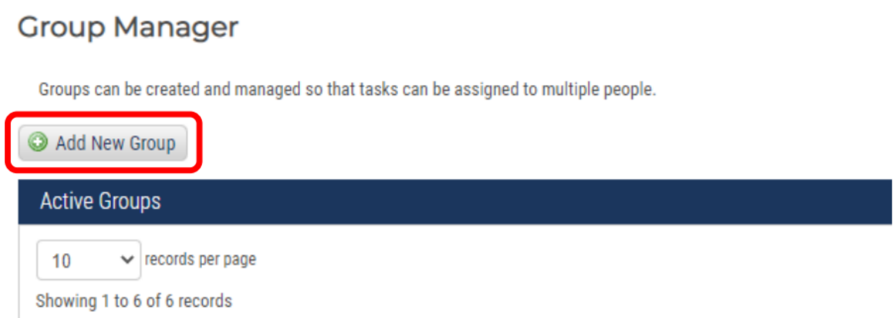
Workflows are set up in the Approval tab of a Solicitation. Workflows can be edited at any time throughout the duration of a grant program. Before adding user groups to approval workflows, they must be created. For complex workflows, multiple groups can be created and organized into a workflow.

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

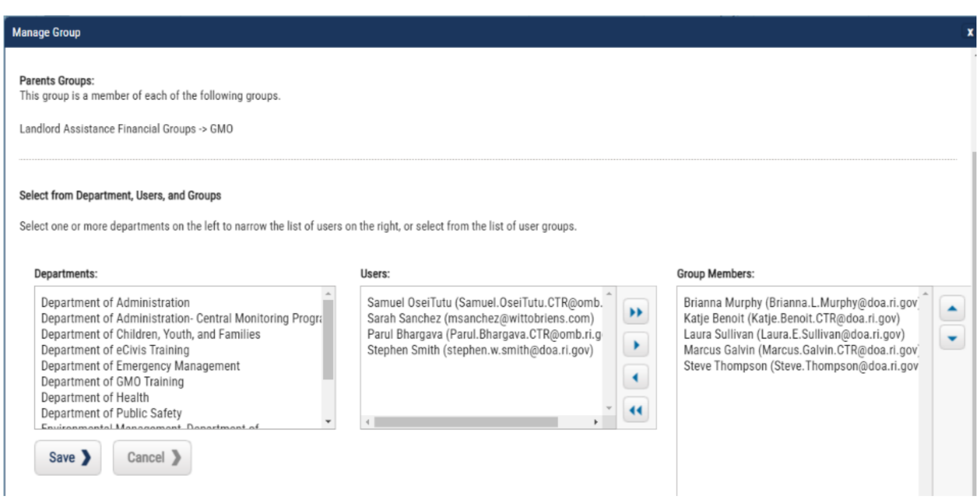


2) Select *Add New Group*.

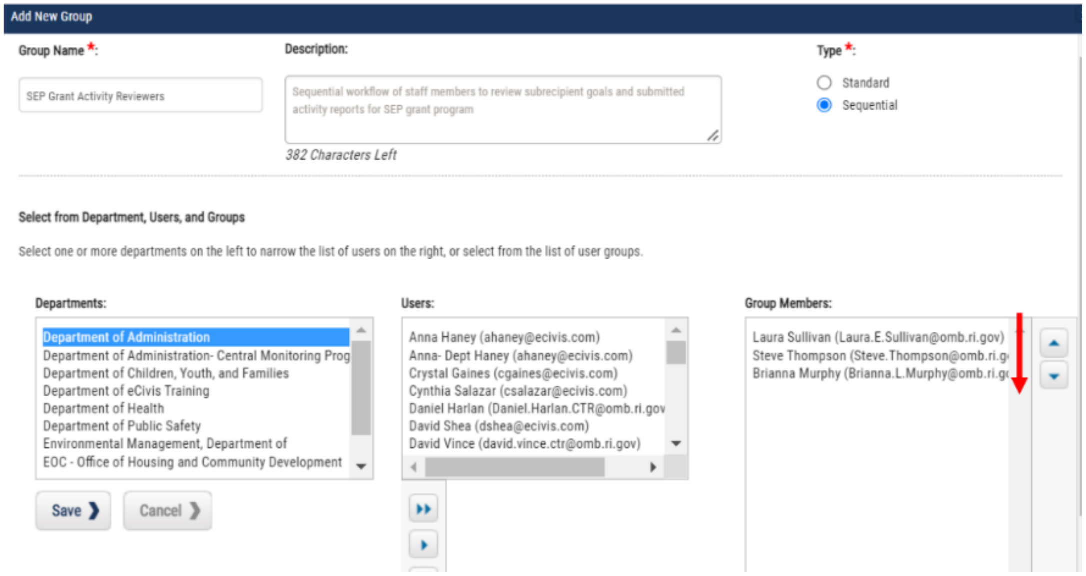


3) A new group form will appear allowing user to create a group. Make sure the Group Name is easily distinguishable to the team managing the program. There are 2 types of groups that can be created:

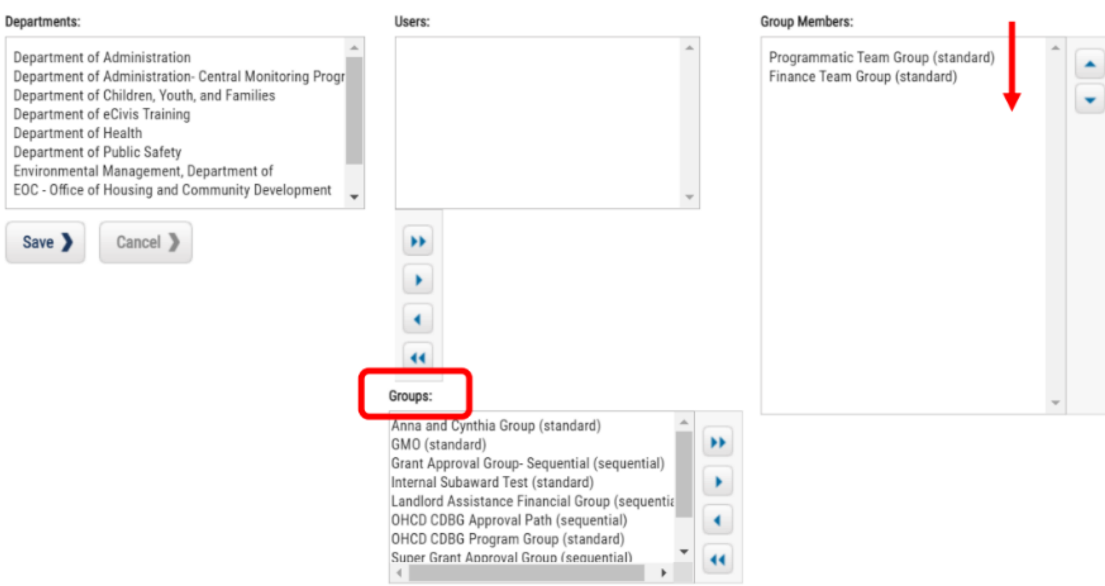
   a. Standard Group: an item is sent to all members of a Standard group at the same time. Any member from this group can review/approve the item. Only one approval is needed for the item to be approved.



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".



- 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.



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

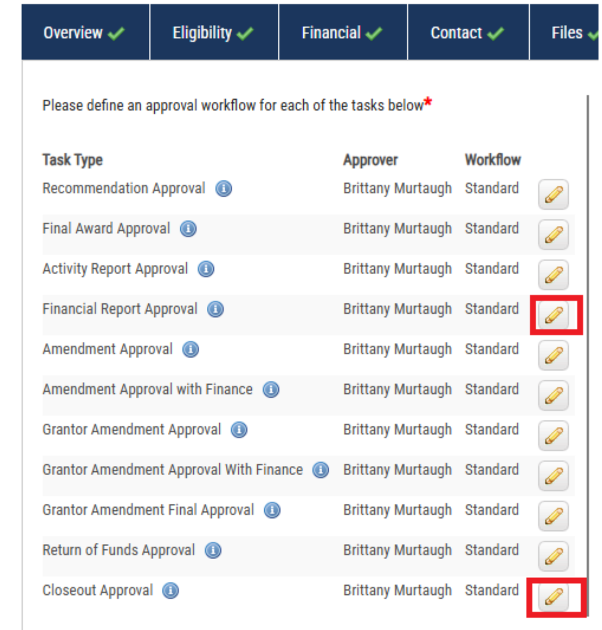
The Grants Management Office has a variety of user guides and documents that can assist applicants in the application and award acceptance process. The files below can be added to the Files tab of the solicitation to provide additional support in these processes.

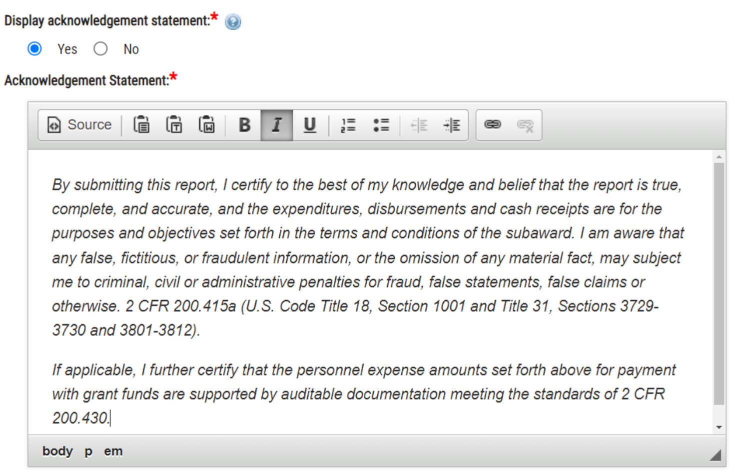
- eCivis Portal Access and Login User Guide: Assist applicants in creating an eCivis Portal account and troubleshooting login errors.
- FAQ for Applicants and Subrecipients: This document answers frequently asked questions from applicants and subrecipients.
- How to Submit an Application: This will walk 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.





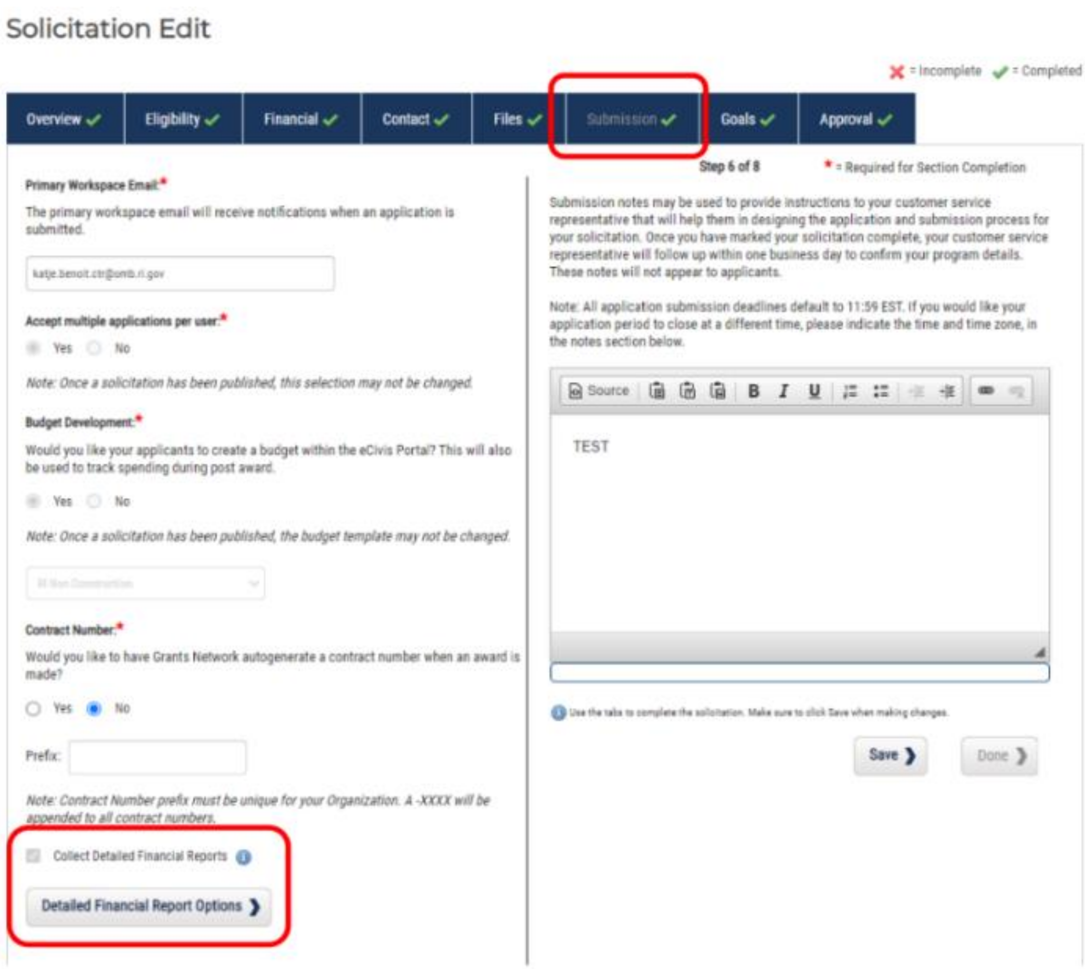
<u>Required Certification Language</u>

"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."

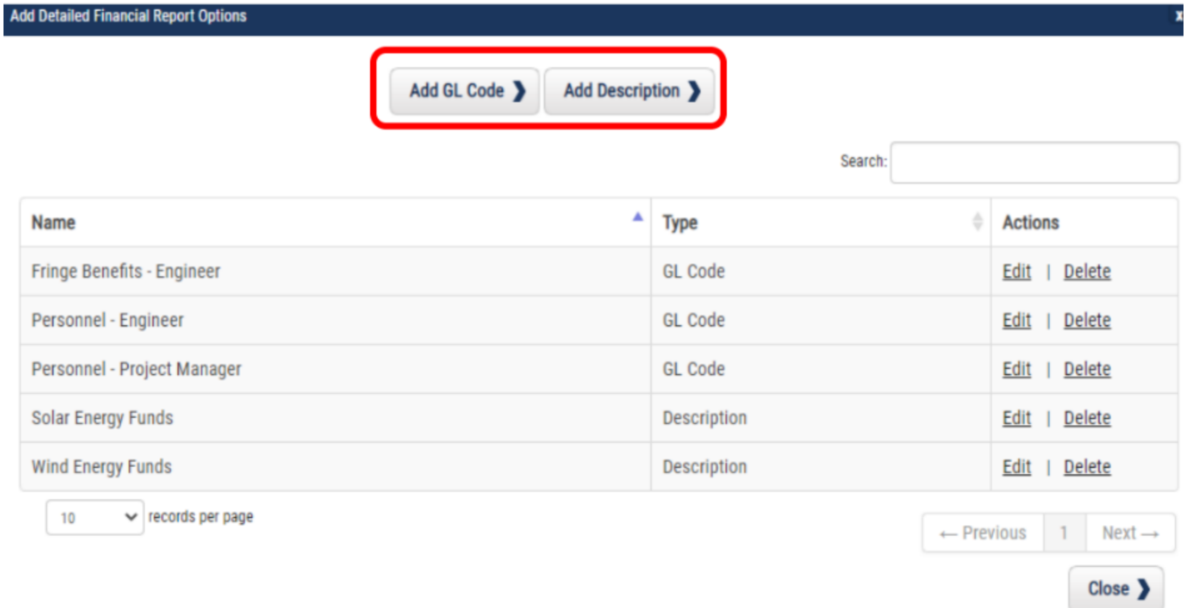
Appendix C: How and Why to Select Detailed Financial Reports in the Solicitation

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.

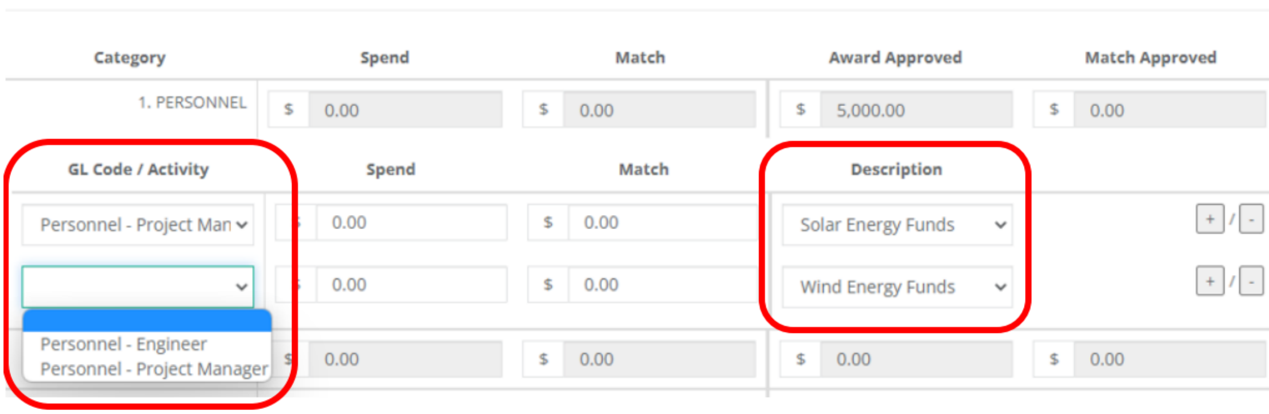
1) Select *Detailed Financial Report Options* on the Submission tab of the solicitation.



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:



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



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

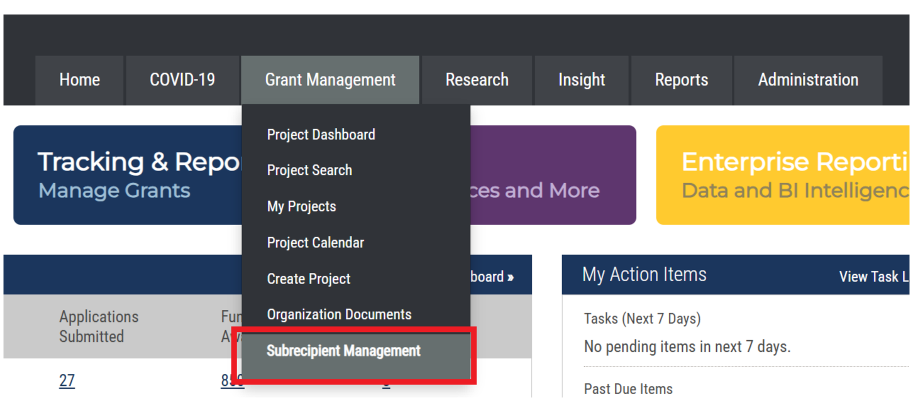
Agencies should continue to provide as much information as possible in the solicitation as outlined in in Phase 2. Subrecipients should be informed and review all program information prior to accepting a grant award. It is up to the agency to provide that information via the solicitation. The fields 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.

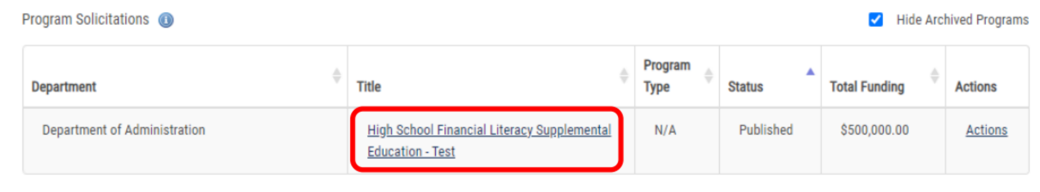
Initiating Direct to Awards

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.

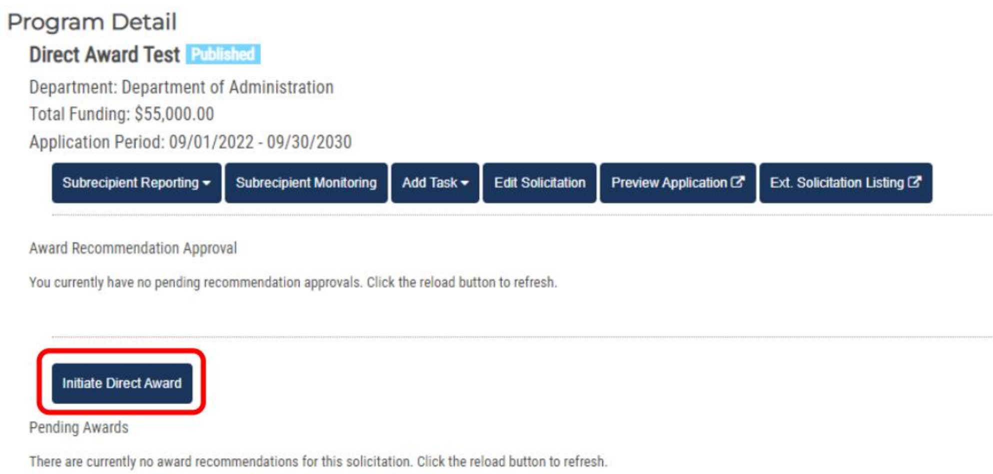
1) Navigate to the "Grants Management" tab and select *Subrecipient Management*.



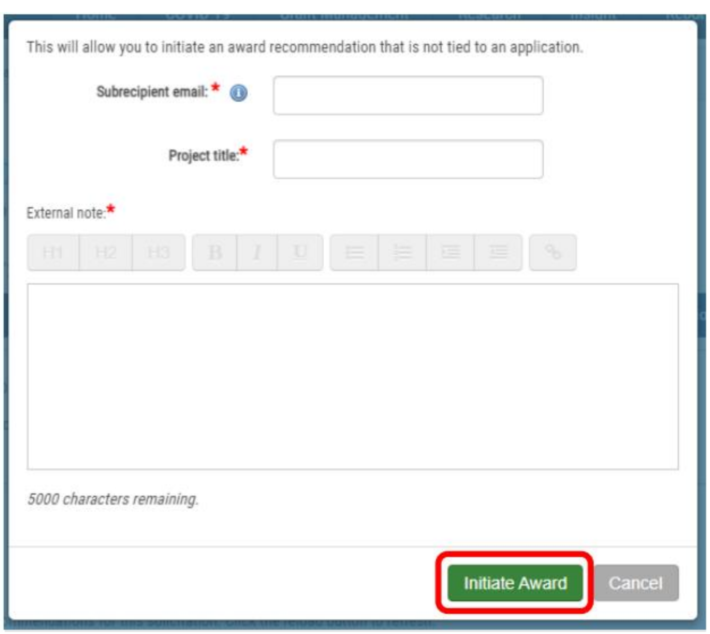
2) Find the grant program from the list of solicitations in the “Program Solicitations” table. Once found, click the hyperlink title to access the “Program Details” page.



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

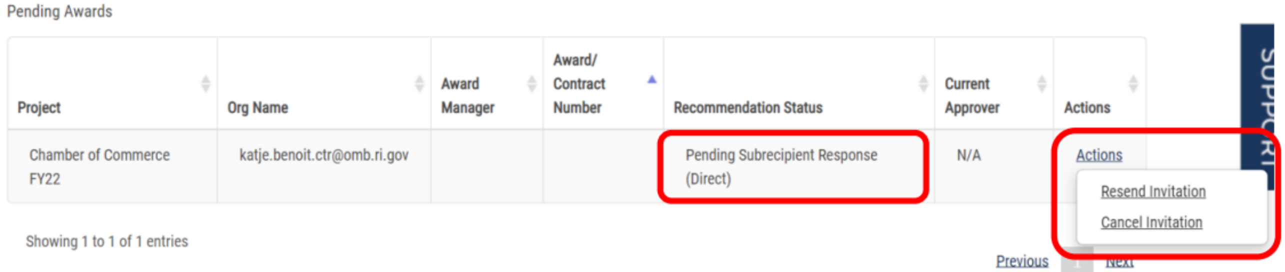


4) An Award Initiation pop-up will appear. To initiate a Direct Award, 3 pieces of information are needed. The email address of the subrecipient, a Project Title, and an External Note that will be included in the automatic email sent to the subrecipient. Once entered, select the green *Initiate Award* 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.

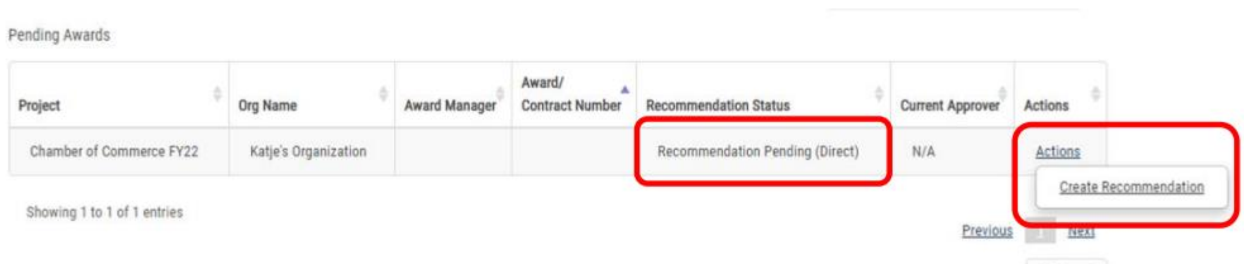


5) If the subaward program has multiple subrecipients, repeat this process to invite each one.

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](#).



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.

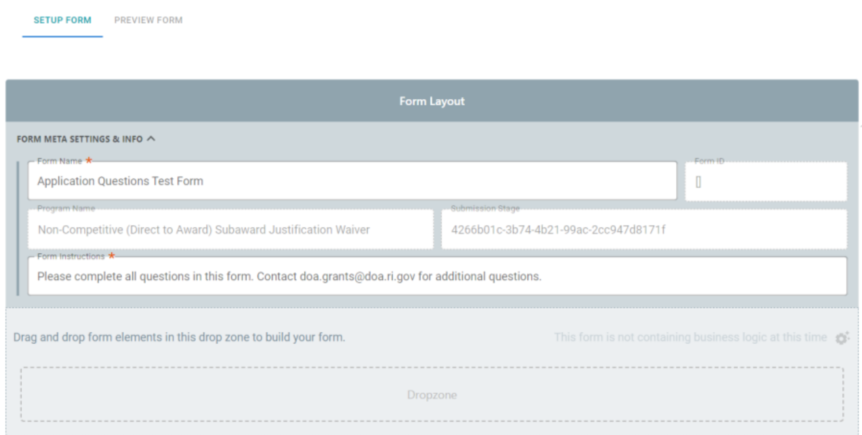


Appendix E: Form Functionality in ARM

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.

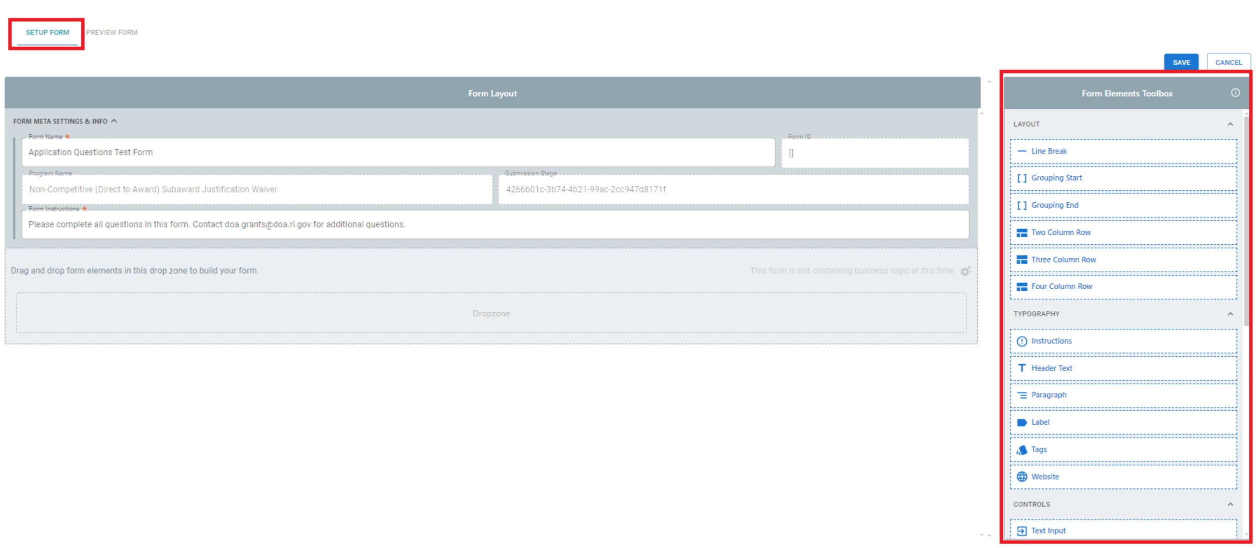
Initiating Form

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.



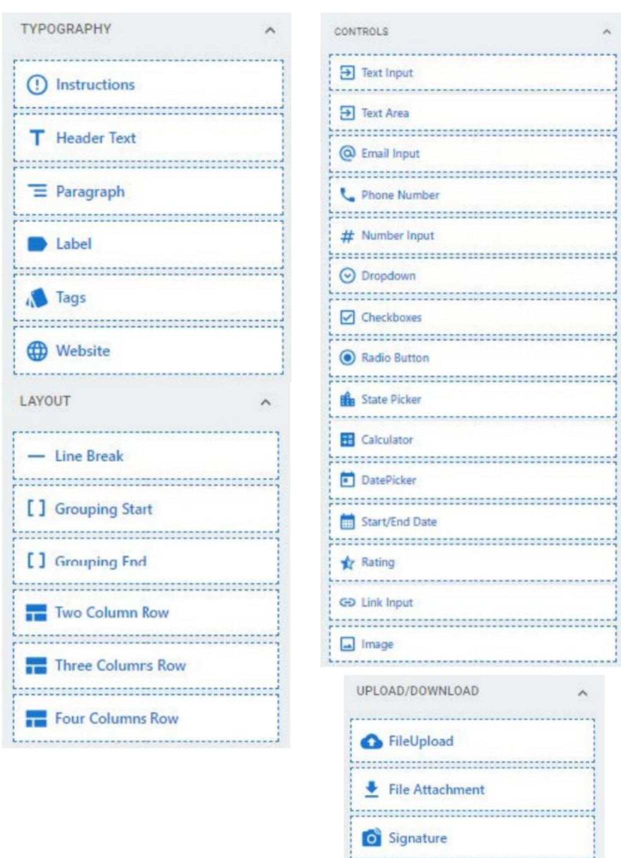
1) **Layout**: Create groupings of fields, rows, columns, and other formatting preferences.
    a. Line Break: Creates a line break between sections of the form.
    b. Grouping Start: Creates a grouping box around any fields below this element but above the next "Grouping End".
    c. Grouping End: 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

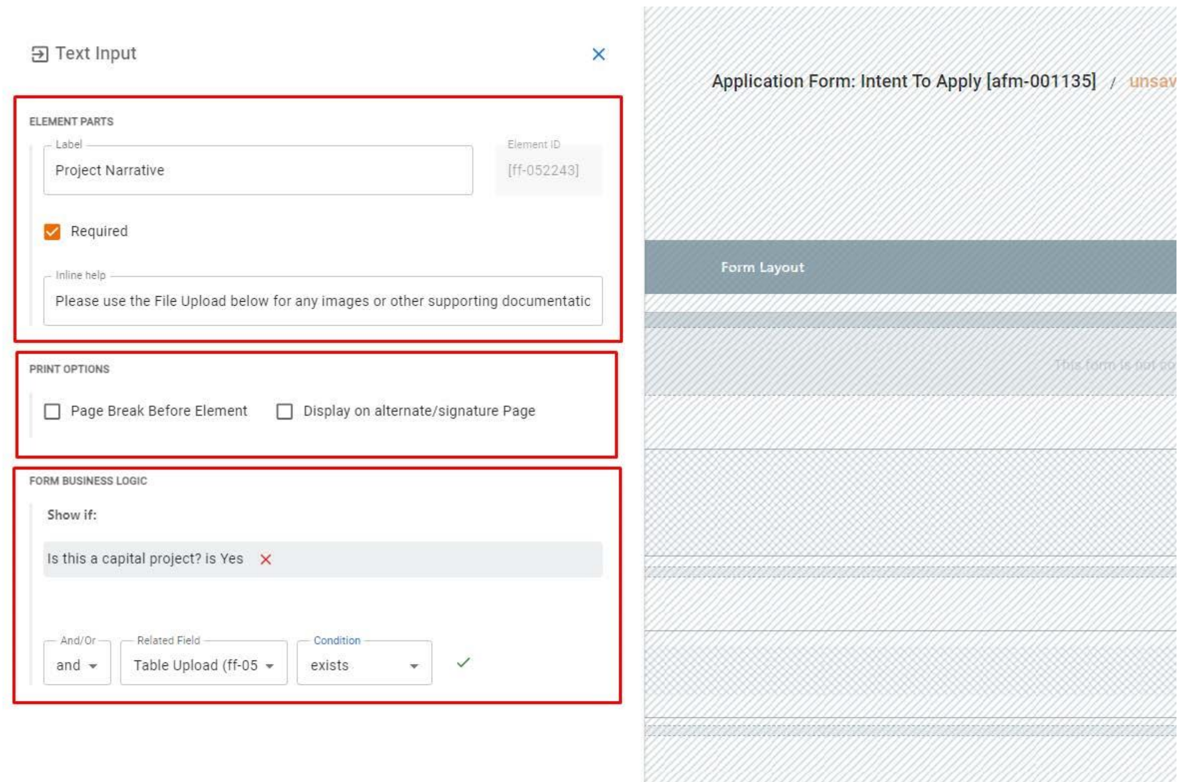
3) **Upload/Download:** Use these to collect files and drawn signatures from applicants or to post a file for applicants to download.
   a. File Upload: Allows for a user to upload a file
   b. File Attachment: Places a downloadable file within the form to be downloaded by the submitter
   c. Signature: 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. <u>Label</u>: Enter the text that should display over this field

b. <u>Element ID</u>: 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. <u>Required</u>: Makes this field required for form users to successfully submit.

d. <u>Inline help</u>: Appears to form users as small grey help text beneath the field.

e. <u>Print Options</u>:

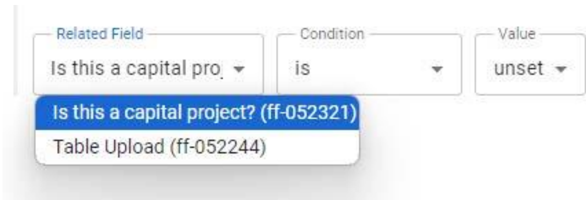
- Page Break Before Element: Insert a page break before this field.
- Display on alternate/signature page: Places this field on a separate page, often coupled with a signature field element

4) Form Business Logic (Set Conditional Fields)

   a. 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.

   b. Then select the condition and value to apply to the field.

   c. When finished, select the checkbox to add the condition.



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

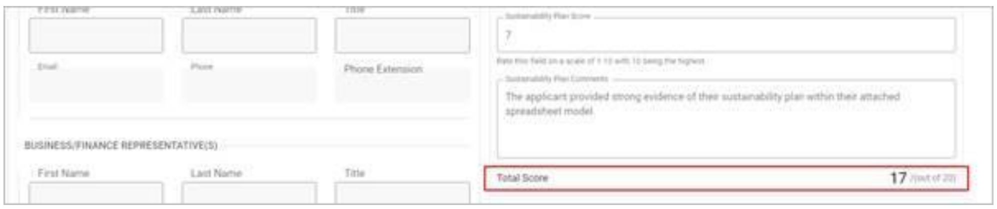
NOTE: Conditional fields work best when the “Related Field” in one of the following field types: Radio Button, Number Input or Dropdown.

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.

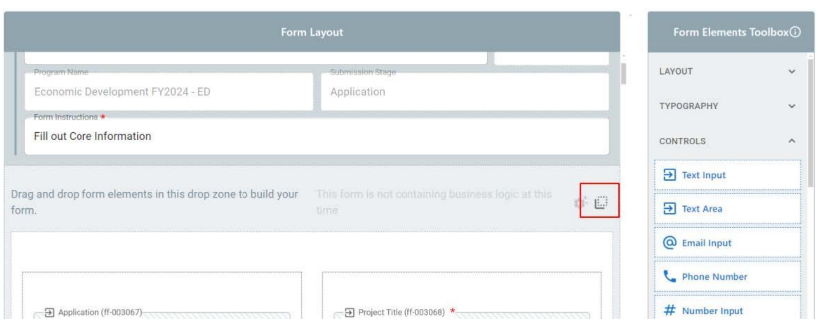
   a. When editing a Number field (or a Dropdown or Radio Button elements that has a numerical value as a response) that will be included in the Total Score, check the box labeled *Include in Total Score*.

   b. Include a minimum and maximum value for this field.

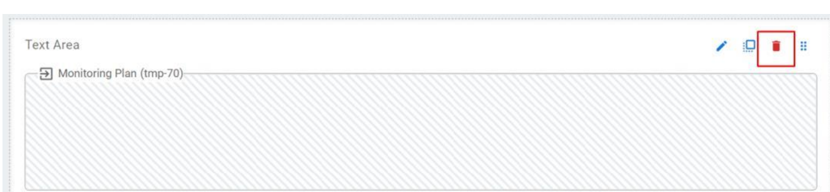
c. When reviewers fill out the form, they will see the Total Score displayed as a fraction of the total possible points. The total possible points will be a sum of the maximum values of all included numerical fields. This can be tested in the “Preview” mode while editing.



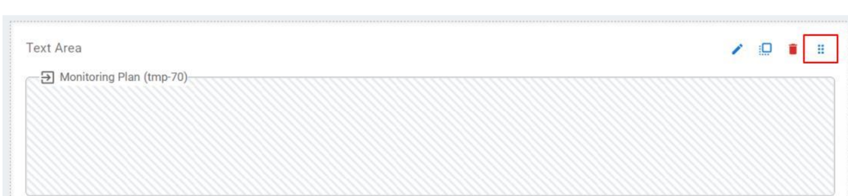
7) Duplicate Fields: To duplicate a form field, select the copy icon, and then select the grey paste icon (at the top of the form), to add the copied field.



8) Delete Fields: Select the trash can icon.



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

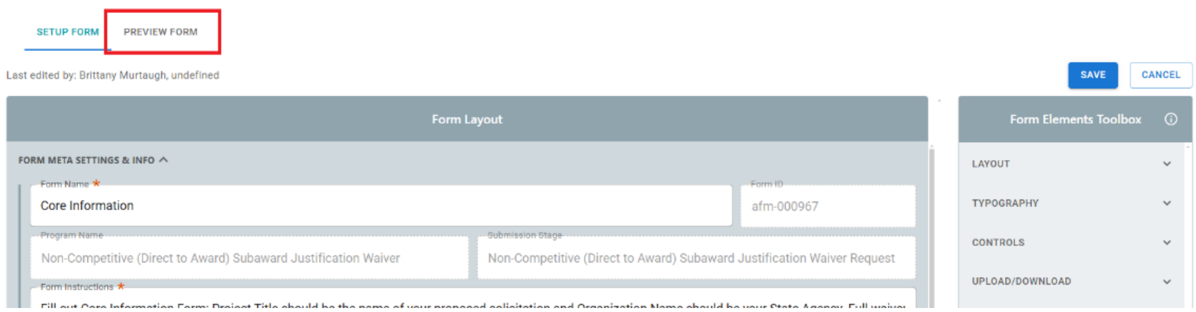


Save and Preview Form

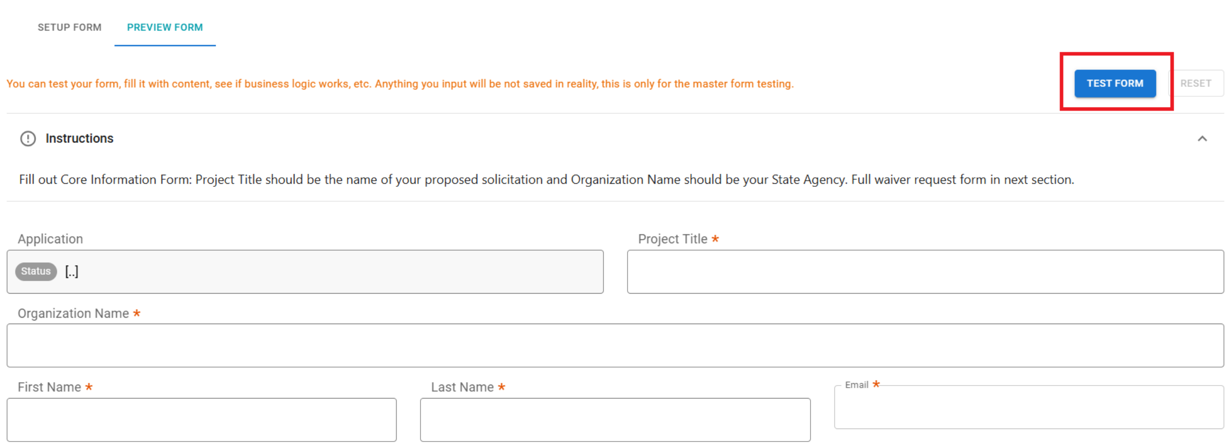
As a form is being edited, users can preview what the form will look like to those completing it.

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

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



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.



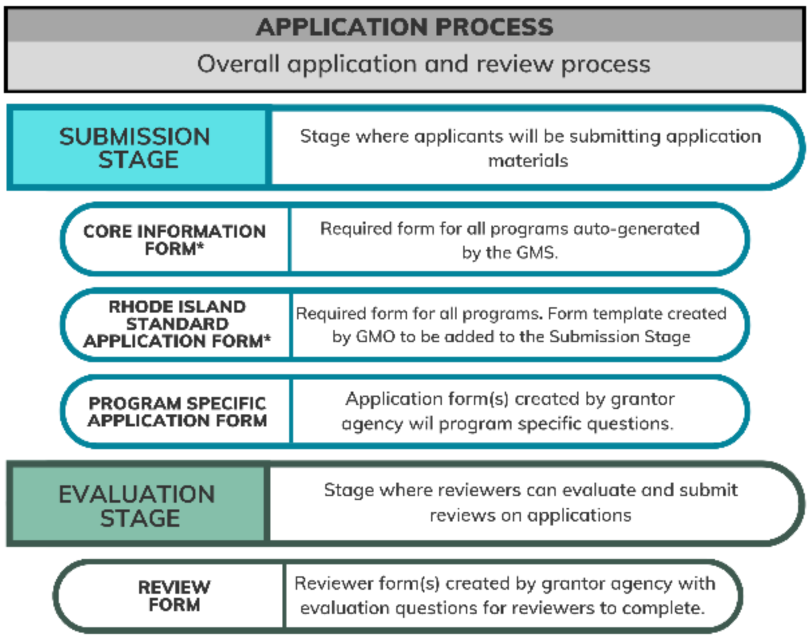
4) To continue editing, select *Edit Form* at the top of the page.

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.

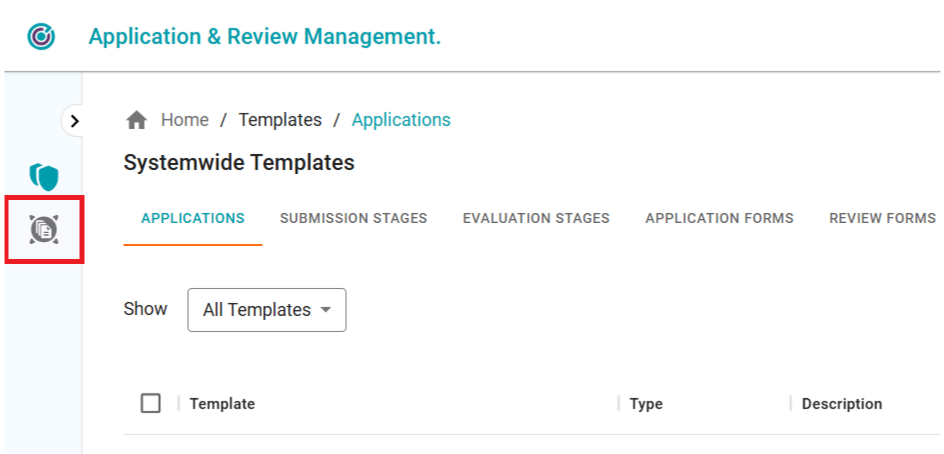
1) Application Process
2) Submission Stage
3) Evaluation Stage
4) Application Forms
5) Review Forms



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.

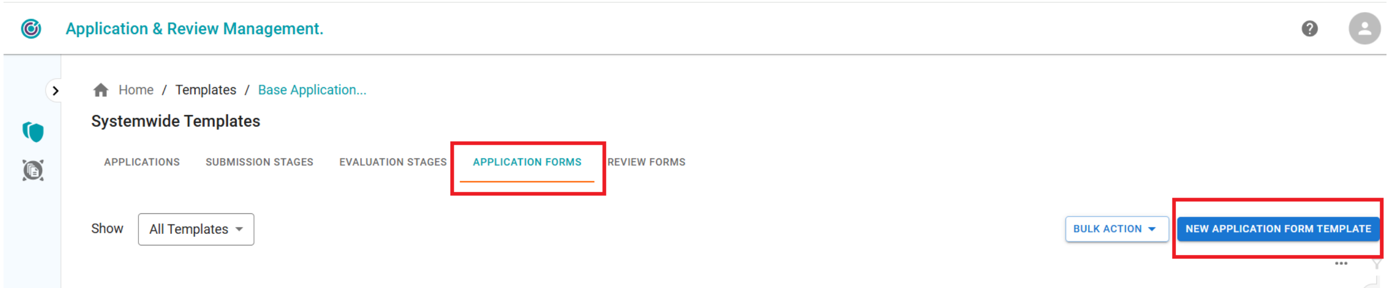
Creating Templates

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

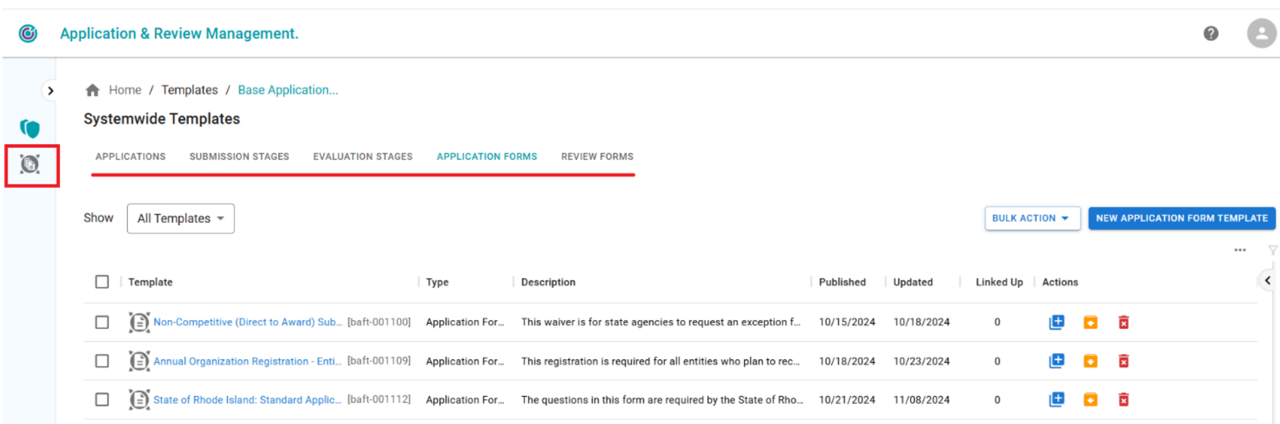


2) The column headers at the top of the page will provide the options of what type of template is being created. Chose the template type by selecting *Applications*, *Submission Stages*, *Evaluation Stages*,

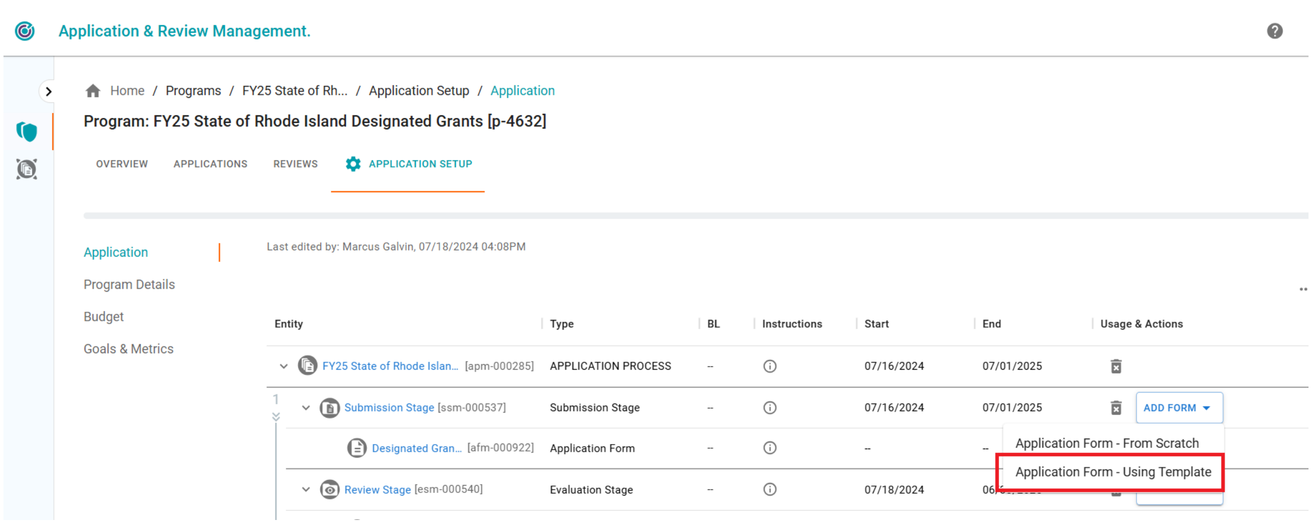
Application Forms, or *Review Forms*. Once the correct heading is selected, then select the blue button to create the template. In this example, a new Application Form Template is being created.



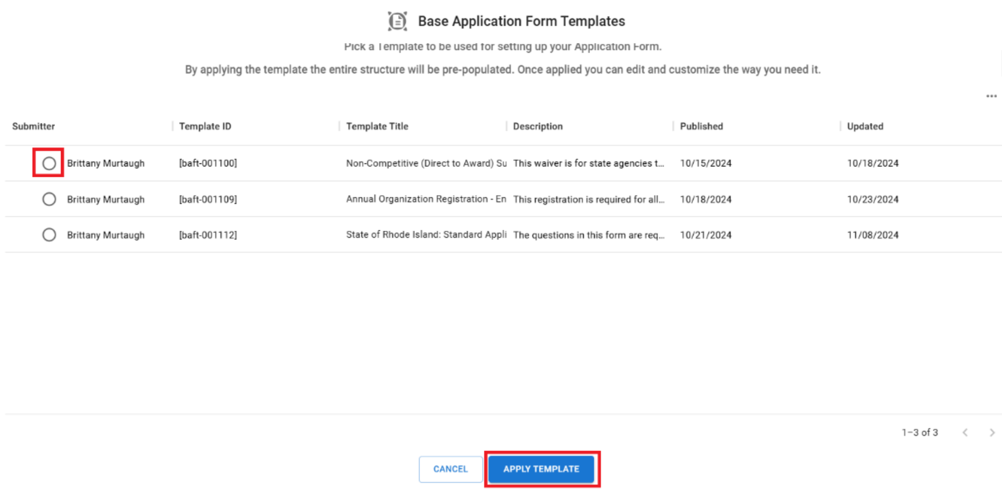
3) Follow the steps to build the template as outlined in the Phase 4 and save once complete.
4) All new templates created will be found under the Template tab, categorized by the type of template that it is (Submission Stage, Application Form etc.). All previously completed templates will be viewable 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.*

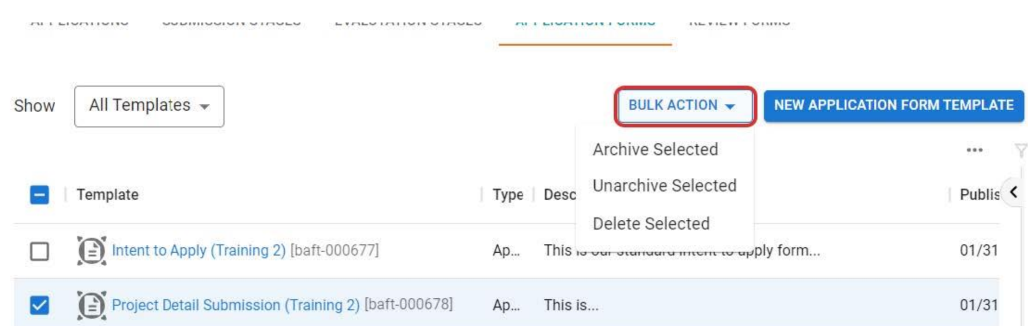


NOTE: Only Application Form templates will appear if adding an Application Form. Only Review Stage templates will appear if trying to add a Review Stage etc.

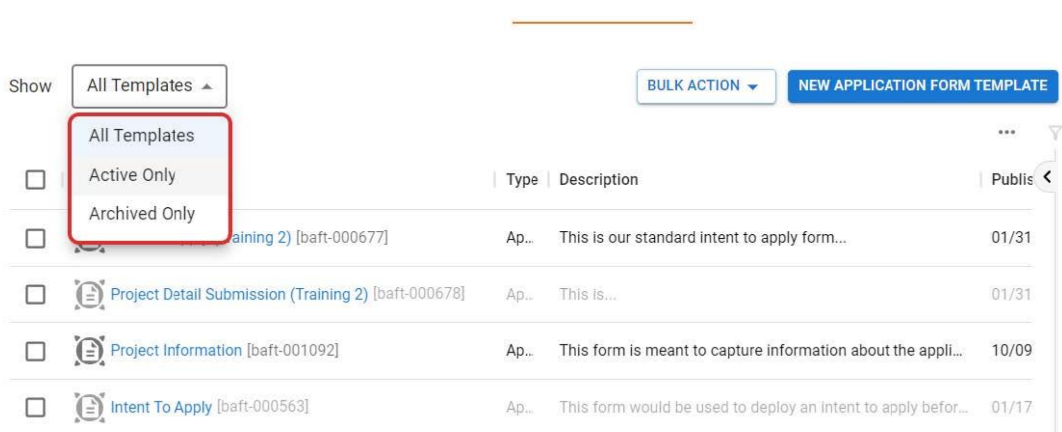
7) That template has now been added to the Application Process for this program. Continue to add additional templates if needed.

Managing Templates

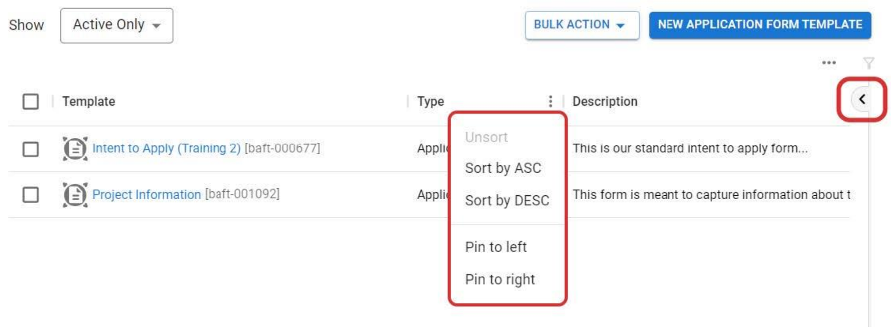
1) To archive, unarchive, or delete Templates, select the desired Templates from the table and open the Bulk Action menu button to select the desired action.



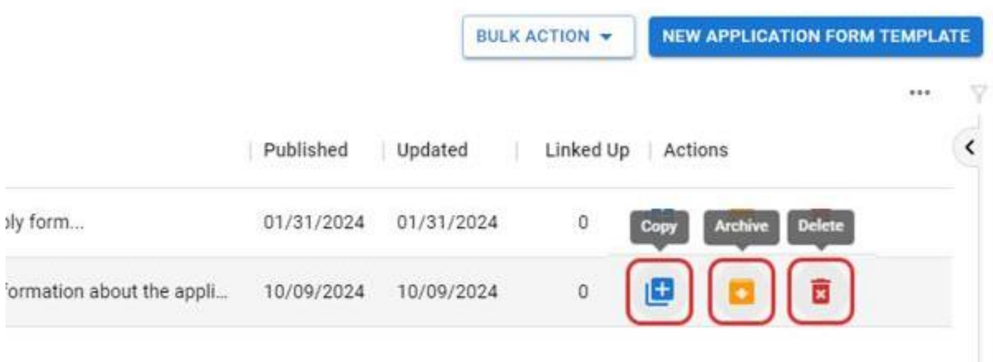
2) Select the *Show* dropdown to pick which Templates will show in the table. Select *Active Only* or *Archived Only* to narrow the results.



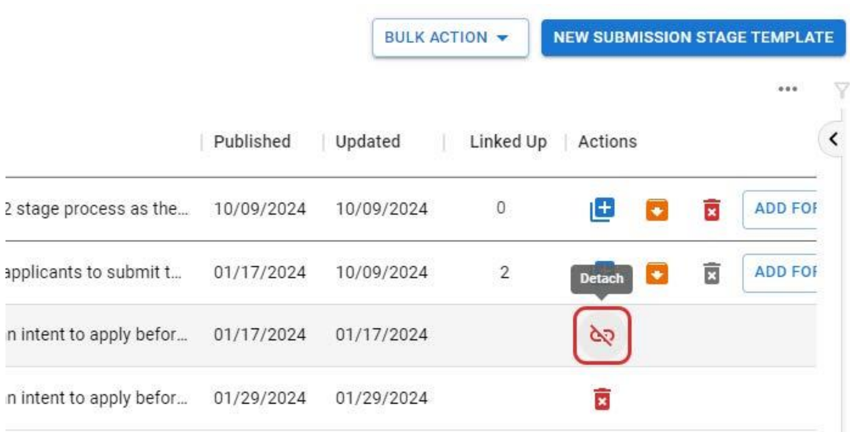
3. For further sorting and filtering, select the three vertical dots above any column or expand the right-hand filter bar by selecting the caret on the top-right corner of the table



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

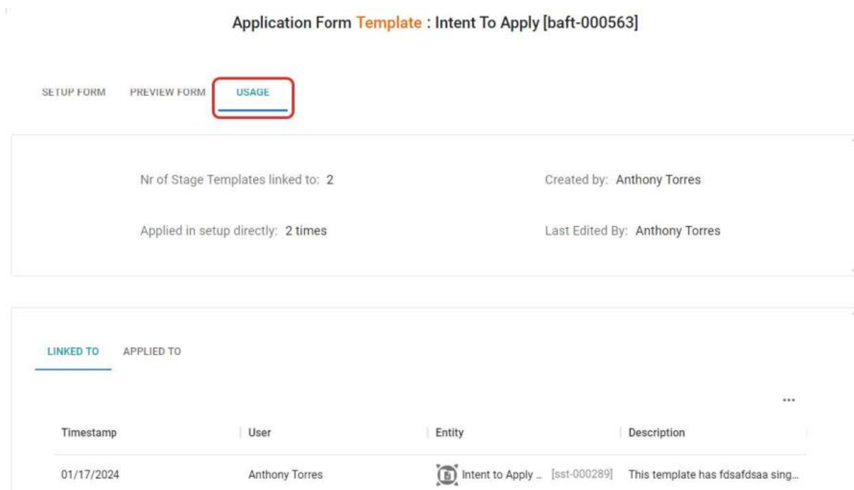


5. To remove a linked Template Form from a Template Stage by select *Detach* from the Actions column.



6. 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”.
   a. 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



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)

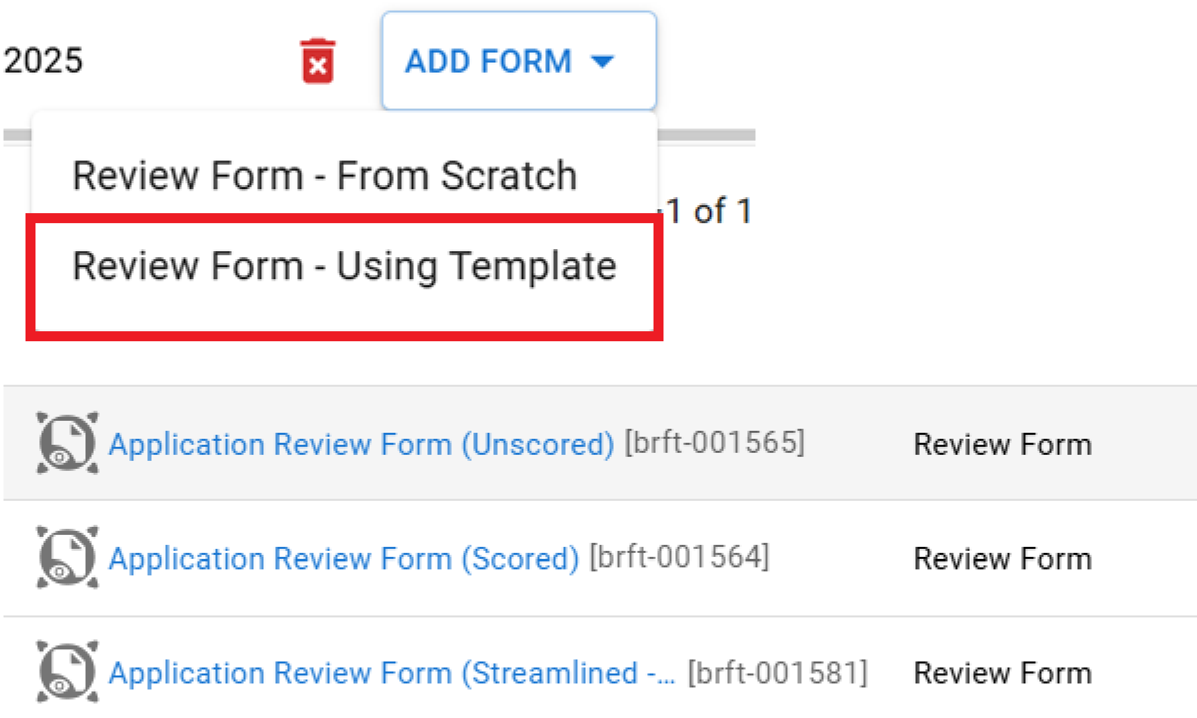
This Review Form Template provides agencies with a basic Review Form with a built-in numerical scoring template, along with other suggested prompts. Agencies can edit this template AFTER it is added to the Evaluation Stage of the program.

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.



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 not 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.

eCivis

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.

eCivis

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.

awardNotification.pdf
21 KB

eCivis

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.

eCivis

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.

eCivis

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]. 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

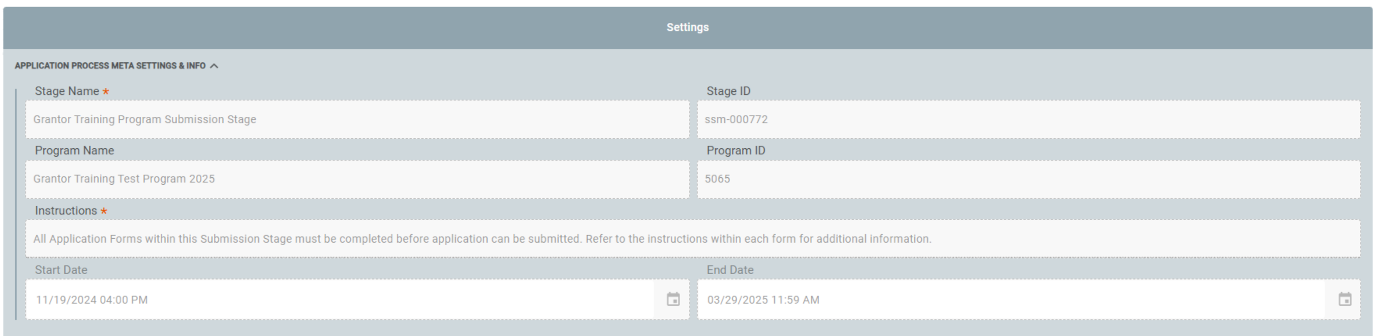
Appendix J: Recommended Stage/Form Names and Instructions

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.”

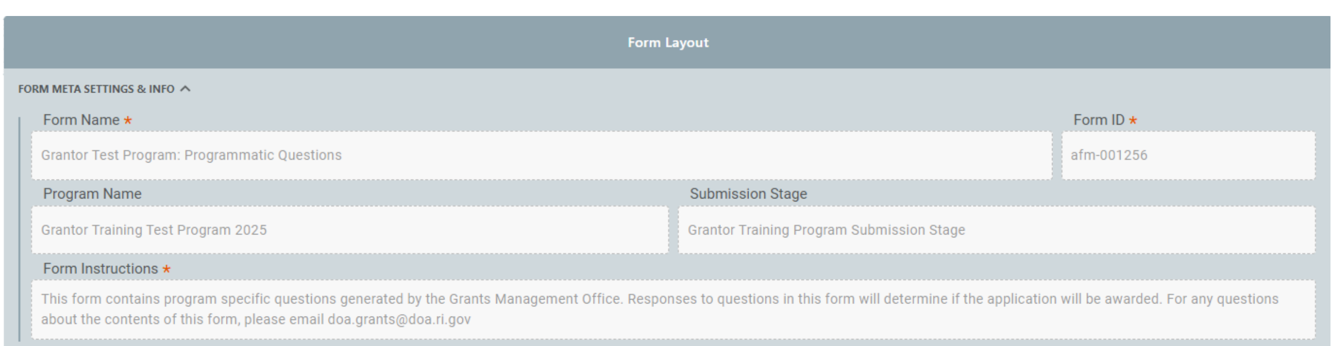


Core Information Form

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.

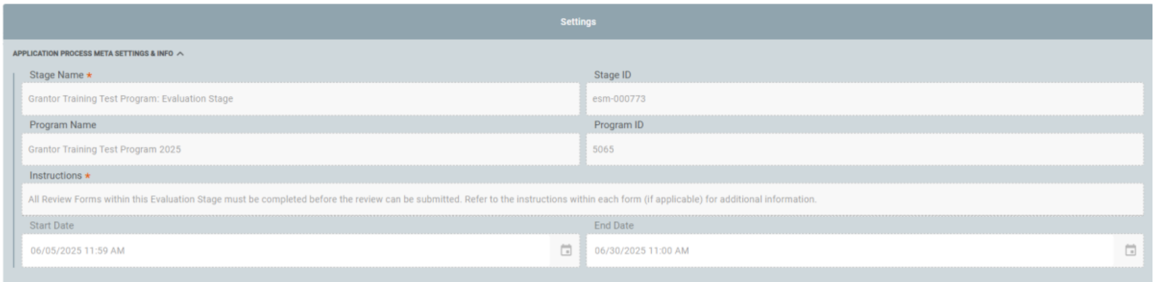
Application Form (Program specific)

- 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]



Evaluation Stage

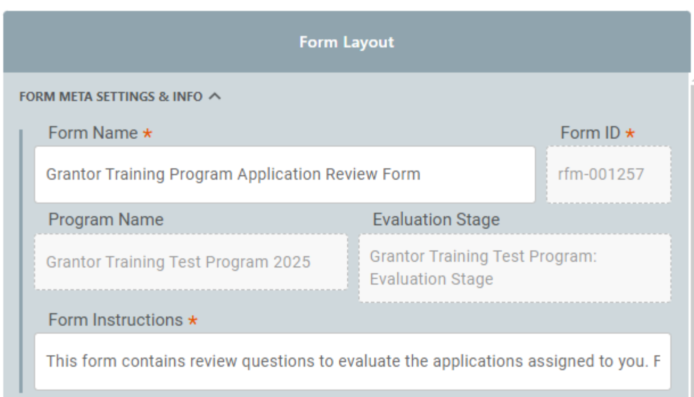
- Recommended Name: [Name of program]: Evaluation Stage
- Recommended Instructions: “All Review Forms within this Evaluation Stage must be completed before the review can be submitted. Refer to the instructions within each form (if applicable) for additional information.”



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.

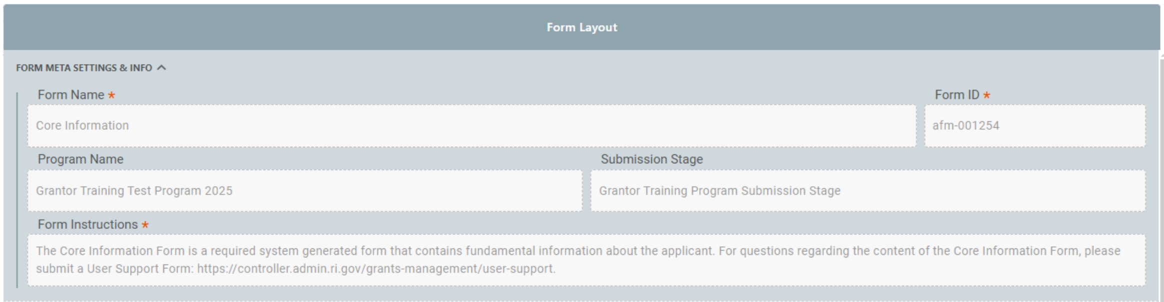
- Review Form Name: [Name of program] Application Review Form (followed by “Committee” or “Staff” if the program uses multiple review forms)
- Review Form Instructions: “This form contains review questions to evaluate the applications assigned to you. For questions about completing the Review Form, email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



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.

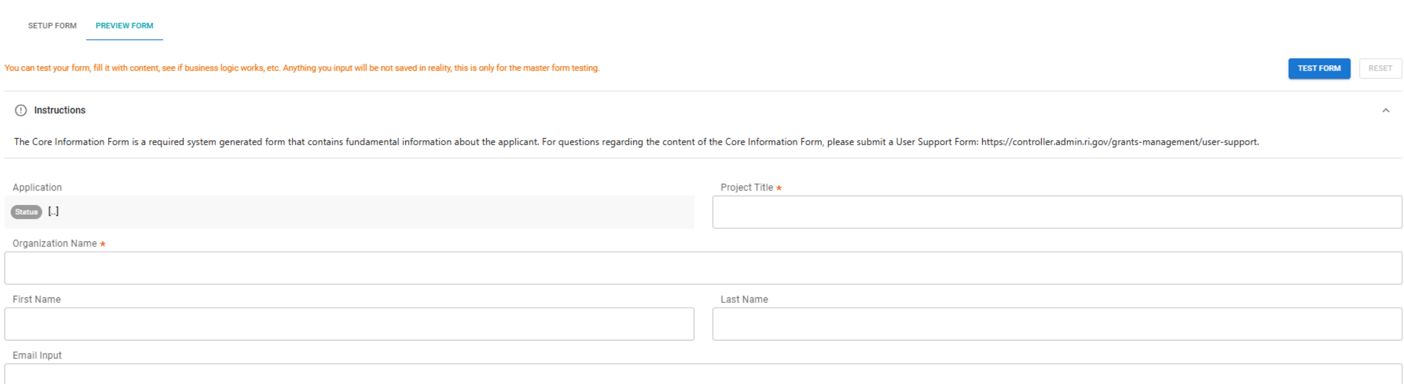


Recommended Form Setup

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.

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



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