HOW TO SUBMIT AN APPLICATION

This guide will demonstrate the steps required to submit an application for a State of Rhode Island grant and provide other important information for applicants.

Grants Management Office

TABLE OF CONTENTS

Introduction

The information in this guide will provide guidance on applying to a State of Rhode Island grant program. Please following instructions carefully.

Recommended items to review before beginning application

Frequently Asked Questions for Applicants and Subrecipients

eCivis Portal Access and Login User Guide

Resources

Intro to Rhode Island Grants and How to Submit an Application training video

All user guides and training materials can be found on the Resources for Subrecipients webpage.

Support

Need assistance? See below for contact method depending on support need.

Question	State Agency	User Support Form
Related to application content	✓	
Eligibility	✓	
Budget, goals, or timeline	✓	
Program requirements, specifications, or documents	✓	
Access or Login Issues with eCivis Portal		✓
Technical issues with eCivis Portal (error messages, loading issues, budget calculations etc.)		✓
Rhode Island grant policy questions (not program specific)		✓
Access to trainings, user guides or other support materials		✓

State Agency: Contact email found in the “Contact” tab of Solicitation (see section 1.2)

User Support Form: Form found here

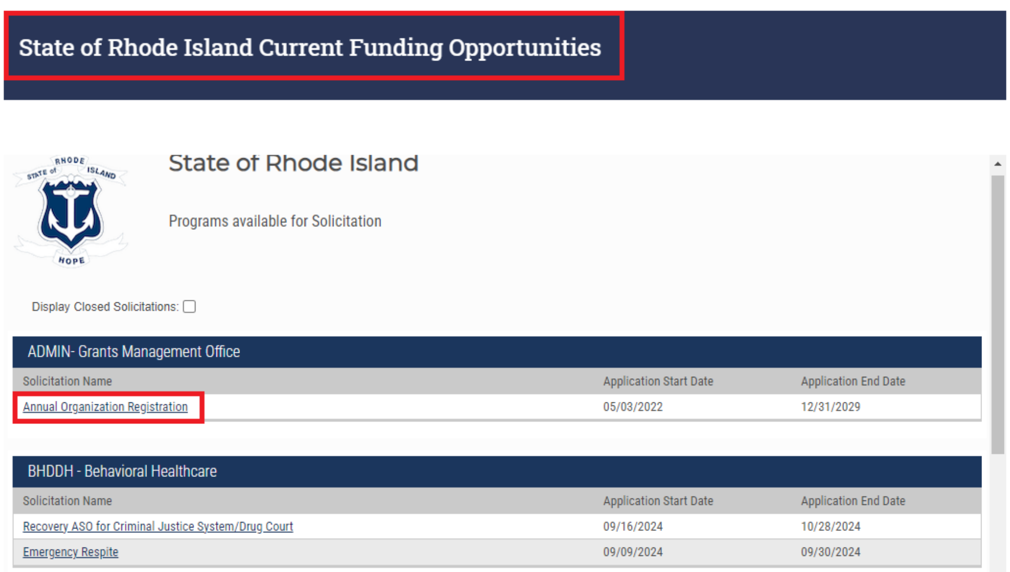
[Part One: Find and Review the Solicitation]()

Solicitations are public-facing notifications of available grant funding from different Rhode Island State Agencies. All active solicitations can be found by visiting the [State of Rhode Island Funding Opportunities webpage]().

1.1. Find the Solicitation

1) Visit the [State of Rhode Island Funding Opportunities webpage]() (https://controller.admin.ri.gov/grants-management/state-rhode-island-grant-funding-opportunities)

2) Scroll down to the "State of Rhode Island Current Funding Opportunities" section to view all available grant programs. Programs are categorized by the state agency administering the program. Once the program is found, select the hyperlink name of the program.



3) This will open the details of the solicitation selected. The next section will explain how to review the solicitation.

1.2. Review the Solicitation

Solicitations are made up of 5 tabs: Overview, Eligibility, Financial, Contact, and Files.

1) Overview Tab: This tab provides general information about the grant program, and other important information from the state agency. It also provides the application period start and end dates. Application forms are accessible to view, edit, and submit from the Application Start Date to the Application End Date.
2) Eligibility Tab: This tab provides information on what entities are eligible to apply for and receive funding for this program. Ensure entity meets all requirements as listed.
3) Financial Tab: This tab provides information of the funding for the grant program, and other financial information provided by the state agency.
4) Contact Tab: This tab provides the state agency contact information for questions about the program. Use the contact listed for all programmatic and application related questions.
5) Files Tab: Download and review the files provided by the state agency. Some files may be informational, and some may need to be completed and uploaded as part of the application. Read the files and the *File Notes* section carefully. Files can be downloaded by selecting the title of the document.
6) Once all the tabs in the solicitation have been reviewed, the application process can begin.

Part Two: Initiate the Application Process and Creating Project Team

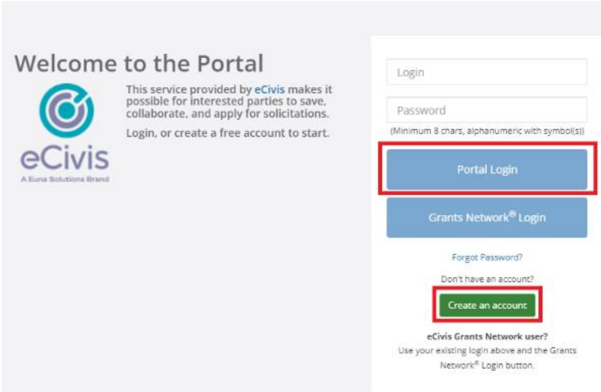
After reviewing all 5 tabs of the solicitation, the next step is to begin the application process.

2.1. Initiate the Application

1) Select the *Apply* button on the solicitation page.

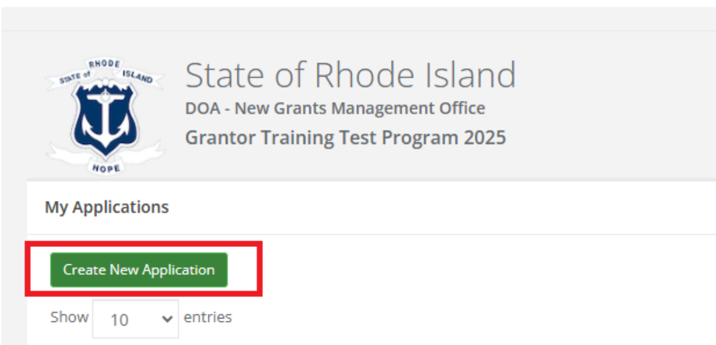
NOTE: If the *Apply* is not there, check the "Application Start" date on the *Overview* tab. A solicitation may be viewable before being open for applications. If the *Apply* button is still missing after the posted "Application Start" date, reach out to the email listed on the *Contact* tab of the solicitation.

2) The eCivis Portal webpage will open. Login using the *Portal Login* button.

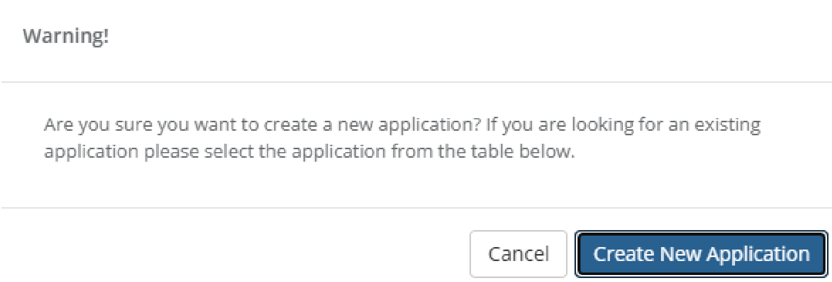


NOTE: To learn how to create an eCivis Portal account, see the [eCivis Portal Access and Login User Guide](), or [Appendix A]().

3) Once the *Apply* button has been selected, the main application page for the program will open. Select the green *Create New Application* button to move forward.



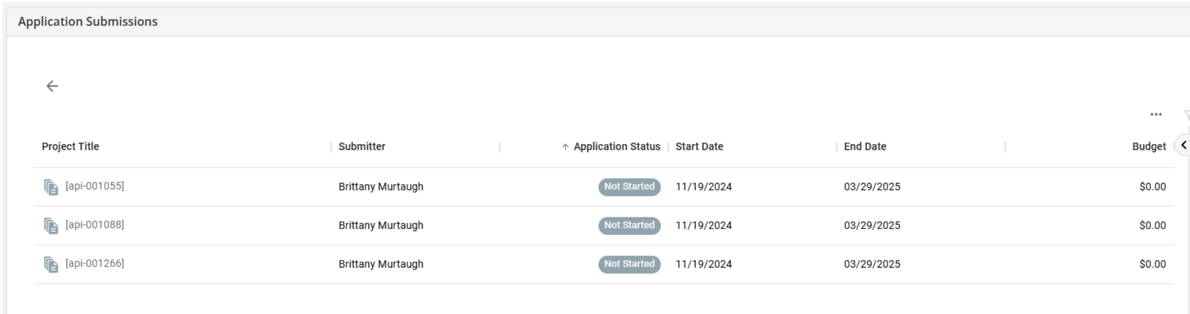
4) The system will display a warning confirming a new application will be created. To access an existing application, click the hyperlink title of the previous application initiated. To continue with a new application, select *Create New Application*.



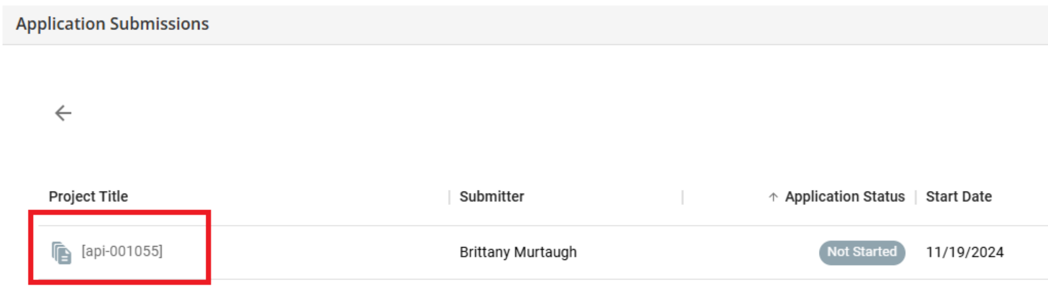
NOTE: Not all programs will allow for applicants to submit multiple applications, so this button may not be available if an application has already been initiated.

5) The new application will appear in the “Application Submissions” table.

NOTE: If the program allows multiple application submissions from the same applicant, this table will list any other application submissions created for this Program.

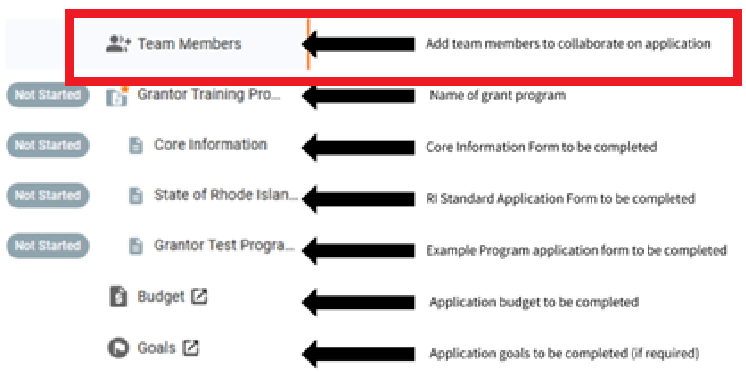


6) Select the newly added Project in the "Project Title" column (labeled with a unique code beginning with "api-"). Applicants will choose a Project Title when filling out the application.

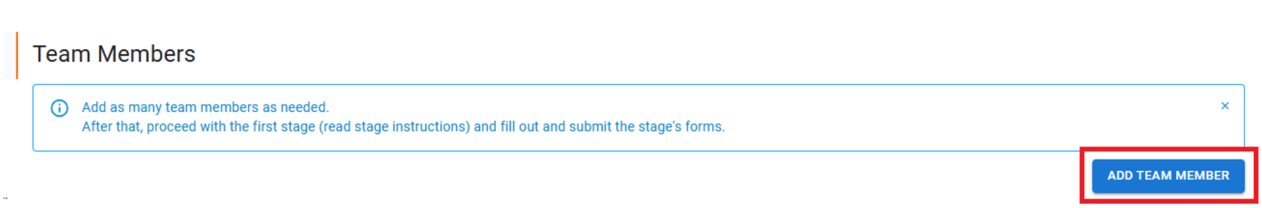


2.2. Creating Project Team

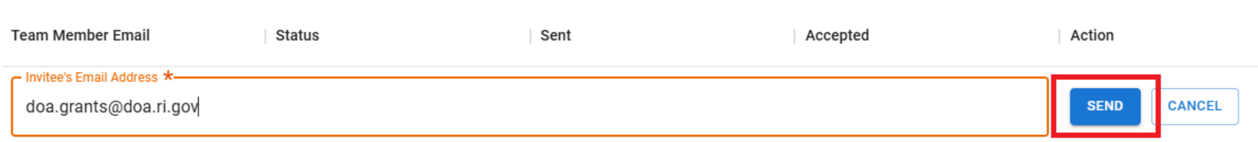
1) Use the following components in the left-hand panel to manage and submit the application, starting with adding team members.



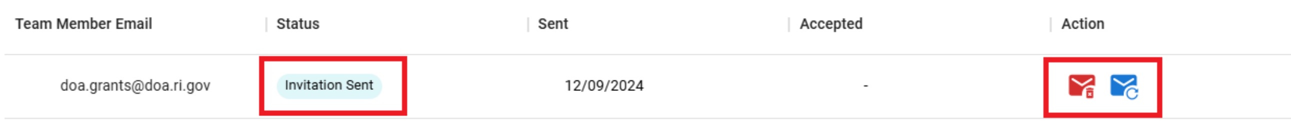
2) Select *Add Team Member* to invite other individuals to collaborate on this application. This step is highly recommended to allow collaboration and prevent loss of access to materials for the entity.



3) Enter the invitee's email address and select *Send.*



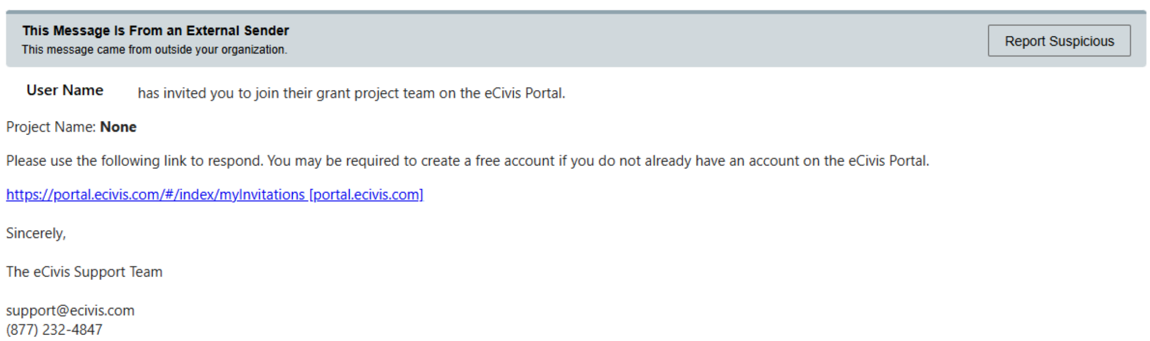
4) Once sent, Project Team Member invitations will be listed as “Invitation Sent” in the table below. If the invitation needs to be deleted, select the red envelope icon. If the invitation needs to be resent select the blue invitation icon.



Team Member Email	Status	Sent	Accepted	Action
doa.grants@doa.ri.gov	Invitation Sent	12/09/2024	-	

5) The invitee will receive an email to access eCivis Portal and accept the invitation. Invitee should click the link to respond to the invitation.

NOTE: To respond to and accept the invite, the invitee must set up an eCivis Portal account if they have not done so already. See Appendix A for instructions.



This Message Is From an External Sender
This message came from outside your organization.

Report Suspicious

User Name has invited you to join their grant project team on the eCivis Portal.

Project Name: **None**

Please use the following link to respond. You may be required to create a free account if you do not already have an account on the eCivis Portal.

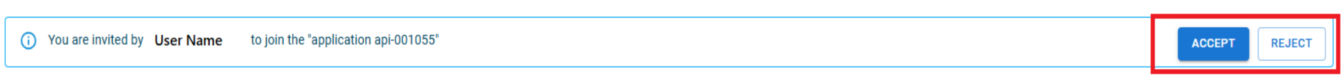
https://portal.ecivis.com/#/index/myInvitations [portal.ecivis.com]

Sincerely,

The eCivis Support Team

support@ecivis.com
(877) 232-4847

6) In eCivis Portal, the invitee will select the My Invitations tab from the navigation bar and select *Accept* or *Reject* for this invite.



7) If accepted, the invitee will then be a member of the Project Team and can access the application via the “My Applications” tab in their eCivis Portal account.

Part Three: Completing Application Forms

3.1. Application Components

There are 5 primary components to the application: the Core Information form, the State of RI Required Form, the Program Form(s), the Application Budget, and the Application Goals

Core Information Form

This form contains basic information about the applicant and other general project information. The questions in this form may vary slightly from program to program, but all competitive programs will contain this form. For questions about answering any of prompts, reach out to the contact listed in the solicitation.

State of RI Required Form

This form contains questions that are required by the State of Rhode Island. All competitive grant programs include the same questions. For questions about answering these prompts, submit a User Support Form.

Program Form(s)

The program form(s) contains questions created by the state agency administering the grant program and are specific to the program that is being applied for. For questions about answering any of prompts, reach out to the contact listed in the solicitation.

NOTE: The Program Form(s) will be titled according to the state agencies' discretion. Additionally, the Program Form may include multiple individual forms to complete.

Application Budget

The budget allows the applicant to provide the grantor a breakdown of how their grant will be spent if awarded. Each state agency may have different parameters for how the budget should be completed and what budget categories applicants are permitted to request funds in. Review the *Files* tab of the solicitation to see if the agency provided guidance on budget requirements.

NOTE: In some instances, a budget may not be required for a particular application.

Application Goals

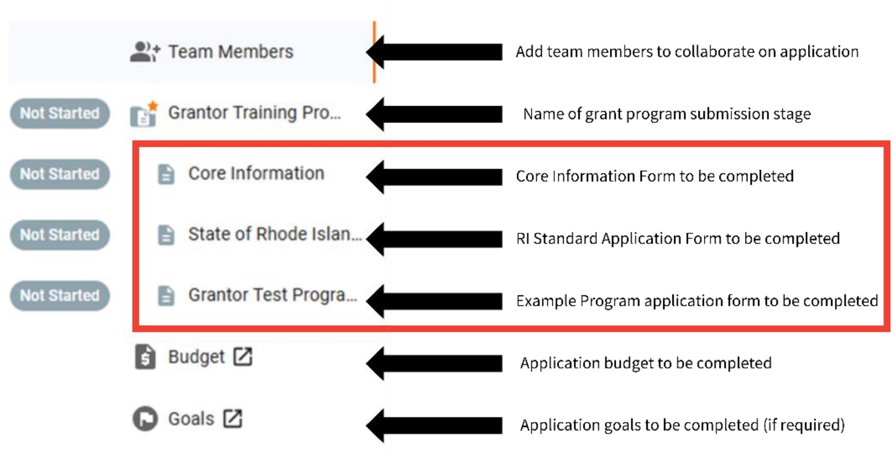
Goals are an optional addition by a state agency to request details on how an entity would achieve the specific goals the agency has for the program.

NOTE: Not all applications will require or have Goals. Please reach out to the state agency contact list in the Contact tab of the solicitation for questions related to Goals.

3.2. Completing Application Forms

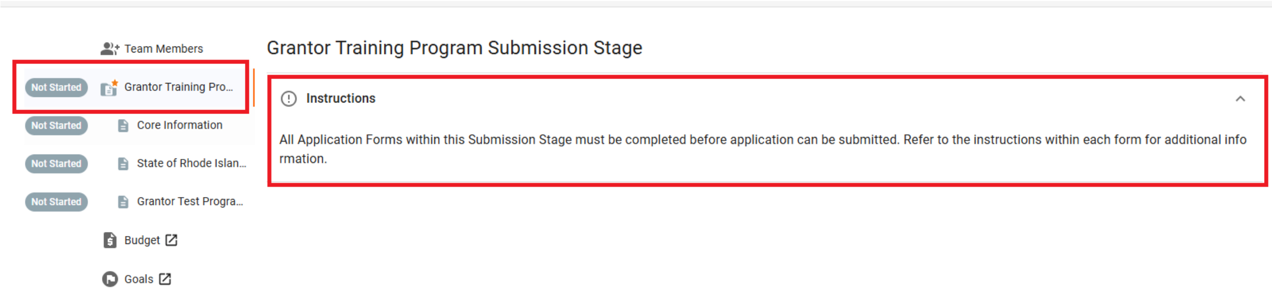
Use the below components in the left-hand panel to manage and submit the application forms.

NOTE: Each program may have unique titles and sequence of some forms.

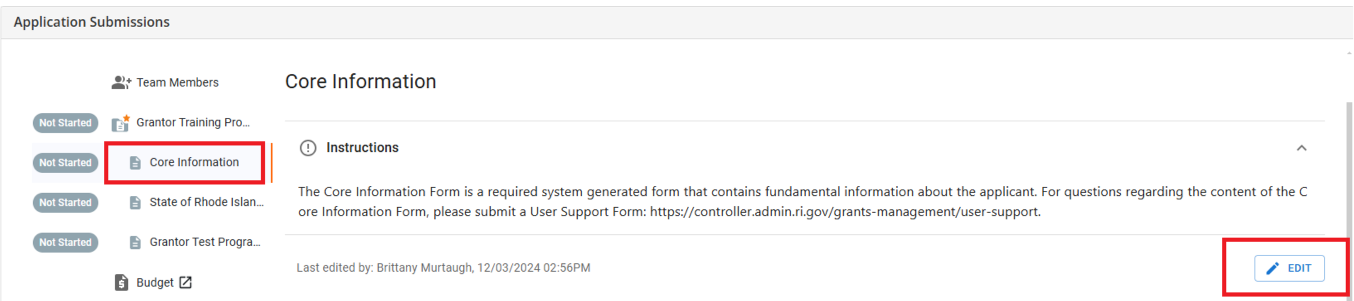


1) Select the Submission Stage tab (identified with an orange star) and read any instructions the grantor has left about completing the subsequent forms.

   NOTE: Some programs may have multiple submission stages



2) Select the *Core Information* form to open and then select *Edit*. Read any instructions before moving forward.



3) Enter the required information in the form. See below for recommendations on required questions.
   a. Project Title: This will be the name of the project through the application process and in the post-award phase if awarded. Chose a Project Title that is distinctive to the entity and to the request being submitted for this application.
   b. Organization Name: Input full organization/entity name with no abbreviations/acronyms.
4) Once all required fields in the Core Information form are complete, select one of two save options:
   a. Save as Draft: If you need to come back and make changes or finish form later.

      NOTE: If you make changes, always select *Save as Draft*.
   b. Save as Complete: If you have fully completed the form and no other changes are needed.

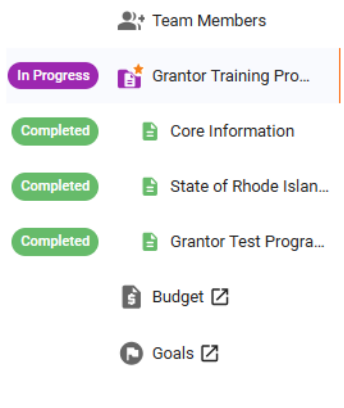
      NOTE: *Save as Complete* does not submit the application and changes can still be made later.

      NOTE: You will need to select *Save as Complete* on all forms before an application can be submitted.

5) Once a form is complete, the status will update to “Completed” on the left-hand menu.

NOTE: Forms can still be edited, even after “completed” until the application is submitted.

6) Repeat steps 2-5 for all forms required for the program being applied for. All forms should have the green “Complete” status to indicate they have been marked complete.



Part Four: Completing the Application Budget

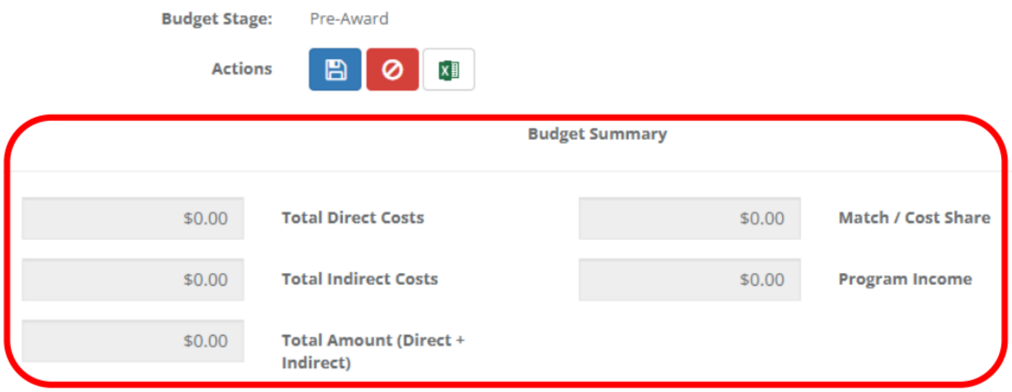
The application budget is an interactive table and narrative that allows applicants to account for how the entity would spend the funding awarded. Ensure all information is entered correctly and follow the directions below and in Appendix B if match/cost share is required for the grant program.

4.1. Budget Components Overview

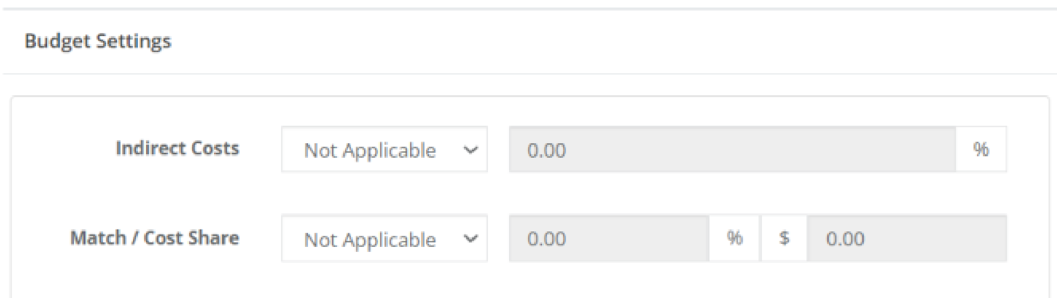
Below are the main components of the budget that will need to be completed. Review the components before starting work on the budget.

1) Budget Summary: The Budget Summary provides an overall view of the proposed budget. When entering budget line items (see next section for additional details), the total for the Direct Cost, Indirect Cost, Total Amount (Direct + Indirect), Match/Cost Share, and Program Income are calculated in the Budget Summary at the top of the page. This section cannot be edited and will only update as information is added/updated in the Budget Items table. Descriptions of fields below:
    a. Total Direct Costs: Sum of all Direct Costs across all budget categories
    b. Total Indirect Costs: Sum of all Indirect Costs across all budget categories
    c. Total Amount: Sum of all Direct Costs and Indirect Costs across all budget categories
    d. Match/Cost Share: Sum of all Match/Cost Share across all budget categories

e. Program Income: Sum of Program Income line items in the Program Income section of the budget form



2) Budget Settings: Unless instructed otherwise by the state agency, it is recommended to use the default Match/Cost Share and Indirect Costs budget settings, listed as "Not Applicable." The "Not Applicable" settings are the easiest to use and allow for budget line-item entries for match and indirect costs, despite the name. For information on the other settings, see Appendix B.



3) Budget Items Table: The Budget Items table is where adjusts to the requested budget items can be made. This table is categorized by Budget Category (i.e. Travel), and then Budget Subcategory (i.e. Out of State Travel). Additionally, within each Budget Category/Subcategory, there are line items. The line items are for entering the proposed budget request (i.e. Mileage, Meals, Airfare)

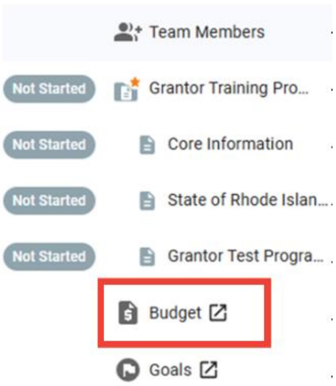
NOTE: Each state agency may utilize their own Budget Category/Subcategories, and/or only allow applicants to request funds in specific categories.

NOTE: Not all application budgets will look the same, as the requirements for each grant program vary. For questions about the application budget, refer the *Contact* tab of the solicitation.

4.2. Budget Functionality

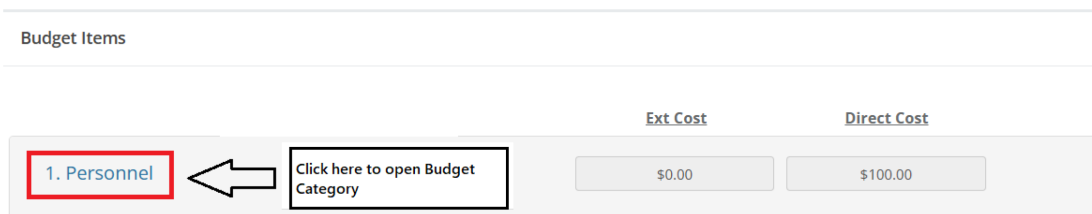
The information entered in the budget should reflect the total award sum requested. Review the solicitation to see if the agency has provided any details on budget guidance for this program. See below for details on utilizing the budget functionality in the application.

1) To access the budget, select *Budget* on the left-hand menu to open the Budget Worksheet in a new tab or window.



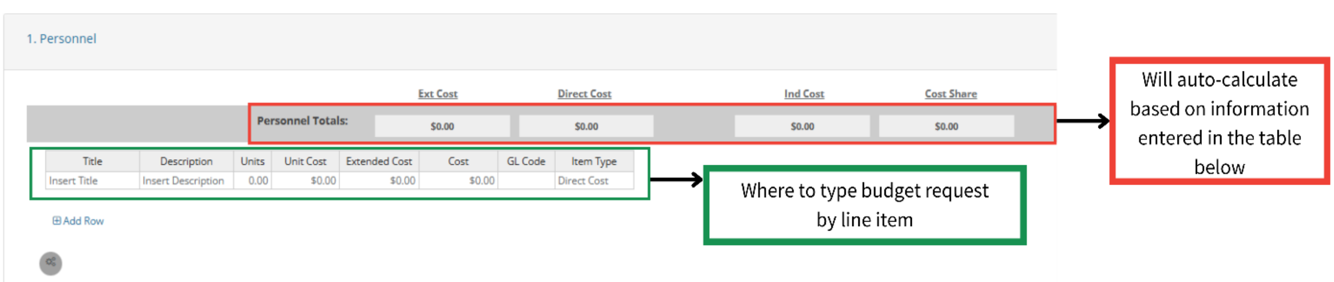
2) Budget Items Table: The Budget Items Table is where to create/adjust the budget, add subcategories, and enter line-item budget entries.

   a. Select a Budget Item hyperlinked category name (i.e. Personnel) to begin adding budget entries.



NOTE: All budget information must be entered at the line-item level. The Budget Item level in grey (i.e. Personnel) will auto-calculate the total sum of all line-item entries added under it.

NOTE: The grey banner at the top of each budget category is a summation of everything entered in that category and cannot be edited.



   b. Once the table appears, budget line-item information can be added.

NOTE: Some fields may change based on the Indirect Costs and Match/Cost Share selection from the Budget Settings section shown above.

1. Personnel

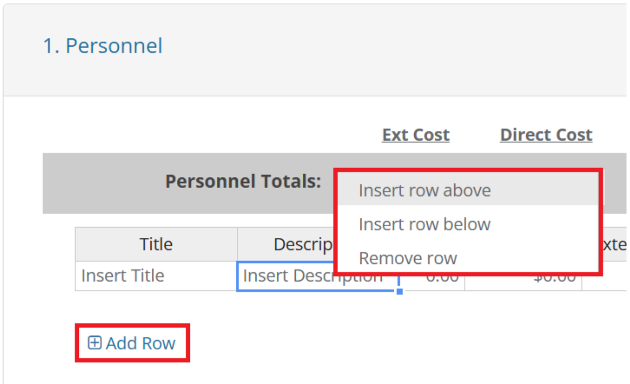
	Ext Cost	Direct Cost	Ind Cost	Cost Share
Personnel Totals:	$0.00	$0.00	$0.00	$0.00

Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Item Type
		0.00	$0.00	$0.00	$0.00		Direct Cost

c. For each line item add at least a Title, Description, Cost, and Item Type. Check to make sure the Item Types are entered correctly. The budget cannot be saved if there is a blank Title or Description field. Descriptions of fields below:

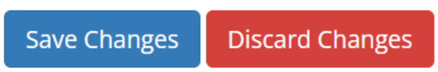
- Title: the name of the budgeted item
- Description: explanation/detail on the budgeted item
- Unit: can be entered as a whole number or decimal if calculating a portion of an item
- Unit Cost: per unit cost (NOTE: if Unit and Unit Cost are used, the Cost and Extended Cost fields will automatically be populated with the Unit number multiplied by the Unit Cost)
- Extended Cost: this is intended to represent the total item cost • Cost: total amount budgeted for this item.
- Cost: Total cost of the budget line item being requested.
- Item Type: Choose Direct Cost, Indirect Cost, or Cost Share.
- Direct Cost: Costs that can be directly linked to a specific grant-supported project or activity. They are costs that would not have been incurred if the project had not taken place.
- Indirect Cost: this field can be calculated in different ways based on the budget settings (shown above). If included as a percentage, check or uncheck this field to include it in the total indirect costs. If included as Itemized, put any amount desired for this item in the Indirect Costs field. If included as Not Applicable, mark this budget item as Indirect Cost and the amount in the Cost field will be included in the total indirect costs.
- Cost Share: this field can be calculated in different ways based on the budget settings (shown above). If included as a percentage, check or uncheck this field to include it in the total Cost Share. If included as Itemized, put any amount desired for this item in the Cost Share field. If included as Not Applicable, mark this budget item as Cost Share and the amount entered in the Cost field will be included in the total Cost Share.

d. To add or remove rows, right click on the table, and select from the available options or select the *Add Row* icon.



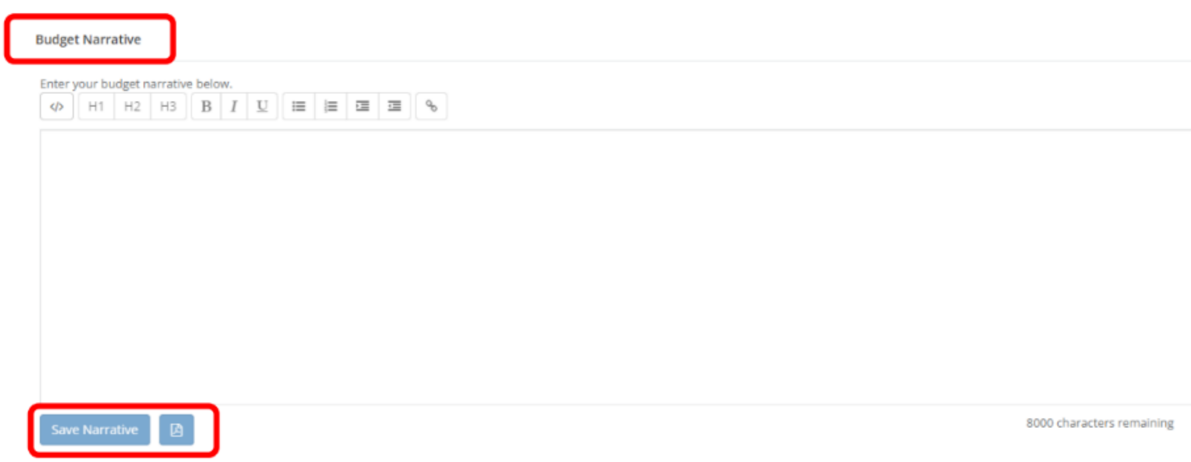
e. Make sure all fields are completed and any extra blank rows are removed by right clicking to remove them from the budget.

f. Once complete, select the *Save Changes* button immediately following the Budget Table before moving on to the Budget Narrative.



3.3. Budget Narrative

At the bottom of the table is the Budget Narrative. The Budget Narrative is an opportunity to provide additional detail, explanation, and/or justification to specific budget line items. The Budget Narrative is also fully compatible with Microsoft Word so developed narratives can be cut and pasted into this section. Once completed, select on *Save Narrative*. Budget Narratives can also be downloaded by selecting the PDF icon.



NOTE: Review the solicitation to ensure the grantor agency has not requested any specific information in the Budget Narrative.

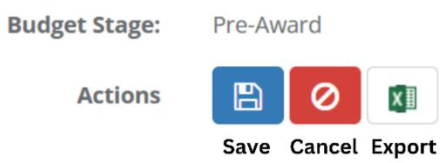
3.4. Completing the Budget

Before completing the application budget, review the Budget Table and Budget Narrative to ensure all information is accurate. Additionally, review the solicitation to ensure any special requirements requested by the agency are addressed.

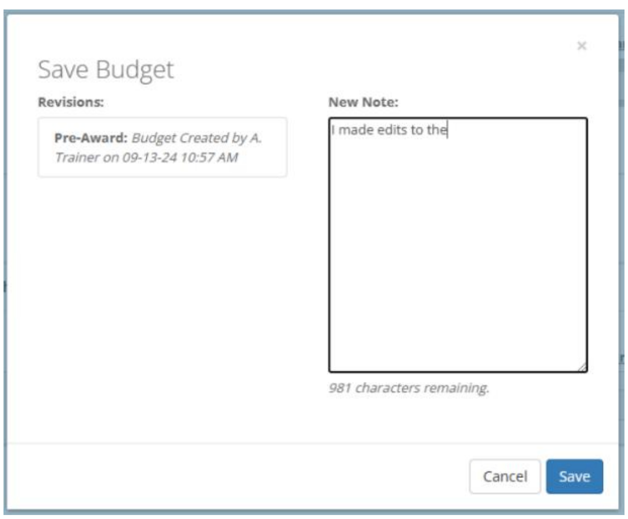
1) Once the budget is complete, select the blue *Save* icon at the top of the page.

   NOTE: This does not submit the application or budget. Changes to the budget can be made at any time before application is submitted.

   NOTE: The budget table can also be exported to Excel by selecting the Excel icon.



2) Any notes an applicant adds will be timestamped and logged in the "Revisions" history to the left of this popup. This history is visible to both the project team members and the grantor agency reviewing this budget.

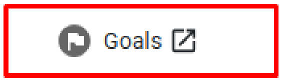


3) When finished editing and saving, close the browser tab containing the budget and return to the previous tab containing the application.

Part Five: Completing the Application Goals

Goals are an optional component of State of Rhode Island grant programs. If there is no Goals section as outlined below, the state agency administering this program does not require goals to be reported through eCivis Portal at the time of application.

1) To check if Goals are required for the application, go to the lefthand menu. If there is a Goals link, select it to open the Goals page. If there is no Goals link, move on to Part Six.

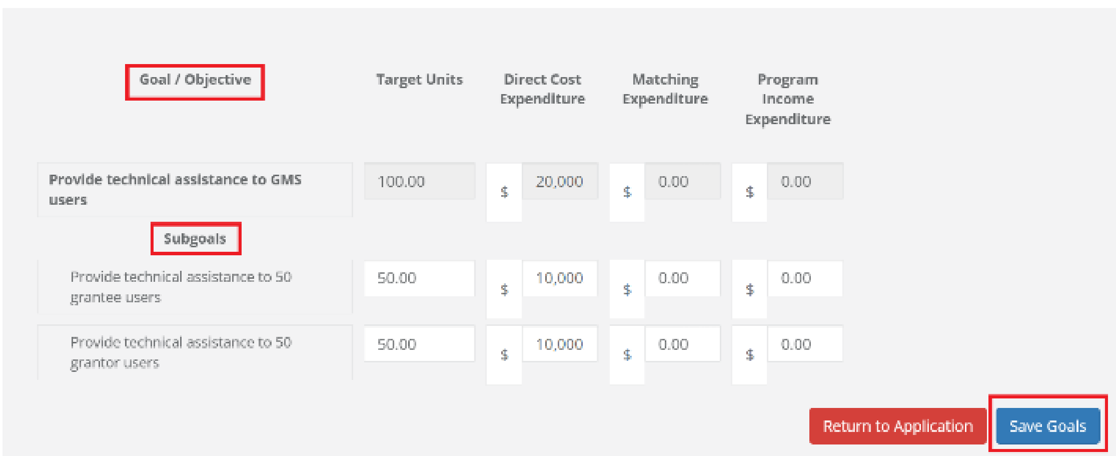


2) Enter the target amounts for any applicable goal areas that the project will address.

   NOTE: The expenditure fields are not used during application but may be used when submitting Activity Reports if awarded.

3) Some grantors may have both Goals and Subgoals. Subgoals are entered and will then add up to the overall Goal total (see example below).
4) When finished editing, select the *Save Goals* button.
5) Close the browser tab containing the goals and return to the previous tab containing the application.

   NOTE: For any questions regarding the goals, contact the grantor agency.

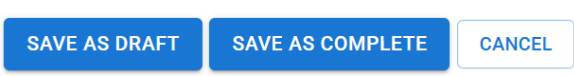


Part Six: Submitting an Application

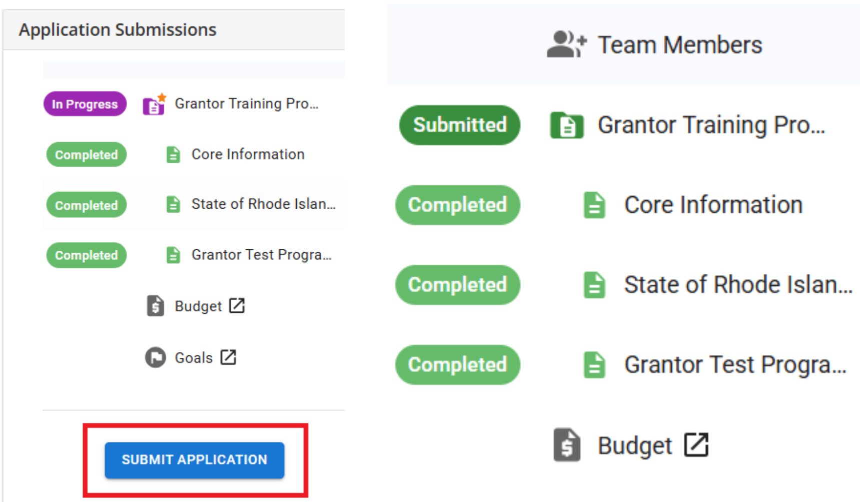
Once all application forms, the budget, and the goals (if applicable) have been completed, the application is ready to be submitted. Please ensure all instructions for the application have been reviewed before moving forward.

6.1. Submit Application

1) Ensure all application components have been completed by looking at the lefthand progress bar. All application forms should be labeled as “Complete”. If the status is “Not Started” or “In Progress”, ensure all information in that form is finalized by selecting *Save as Complete*. This must be done for each application form (see section 3.2)

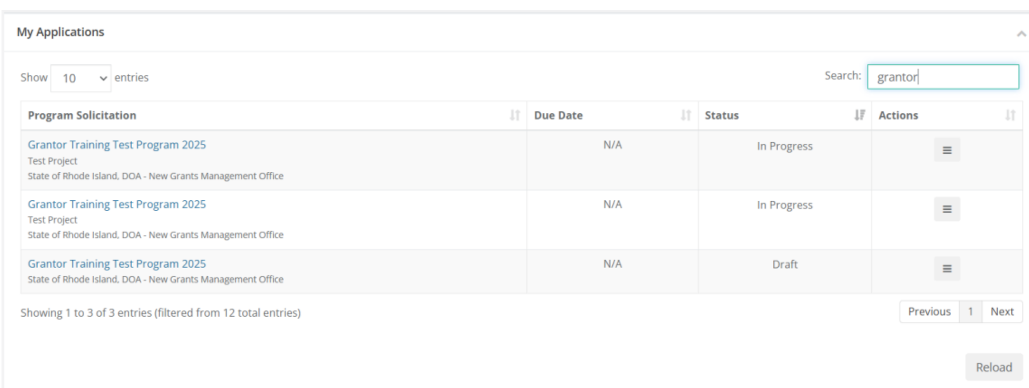


2) Once all application forms are labeled as "Complete" and the budget and goals (if applicable) have been completed. The *Submit Application* button will turn from grey to blue, indicating the application is ready to be submitted. Click the *Submit Application* button to submit all application materials. The application status bar will then change from "In Progress" to "Submitted".

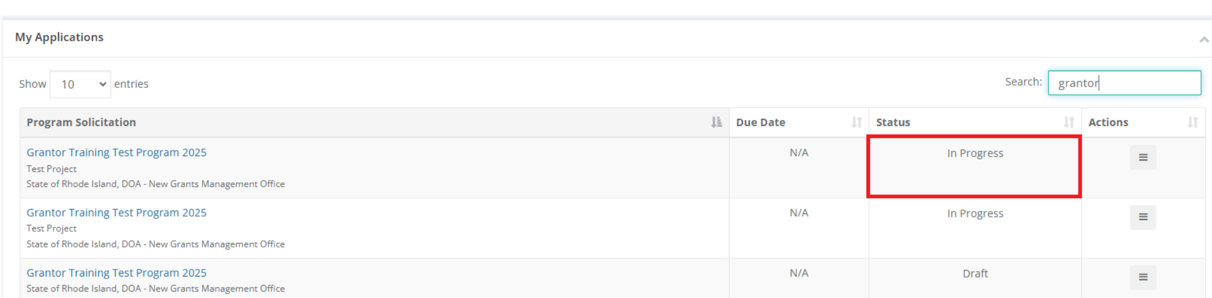


7.2. Confirm Application is Submitted

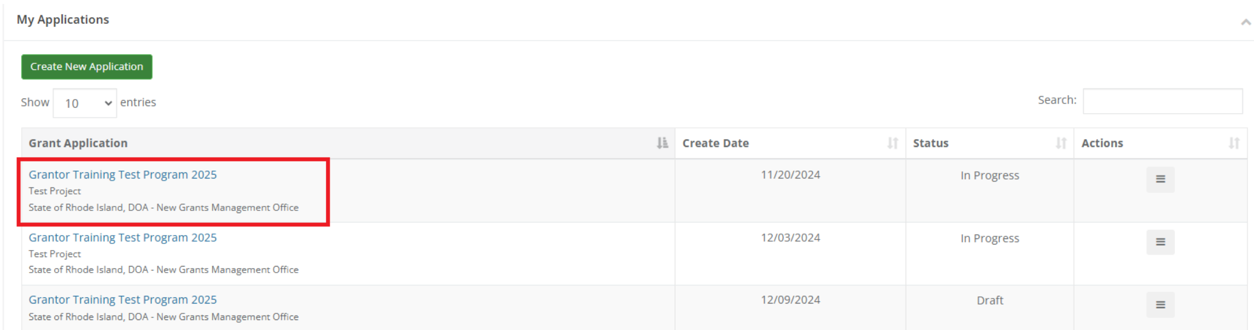
1) To confirm the application has been submitted, navigate to the "My Applications" from the left-hand navigation bar. Then, use the top-right search bar or sort the headings of this table to find the application.



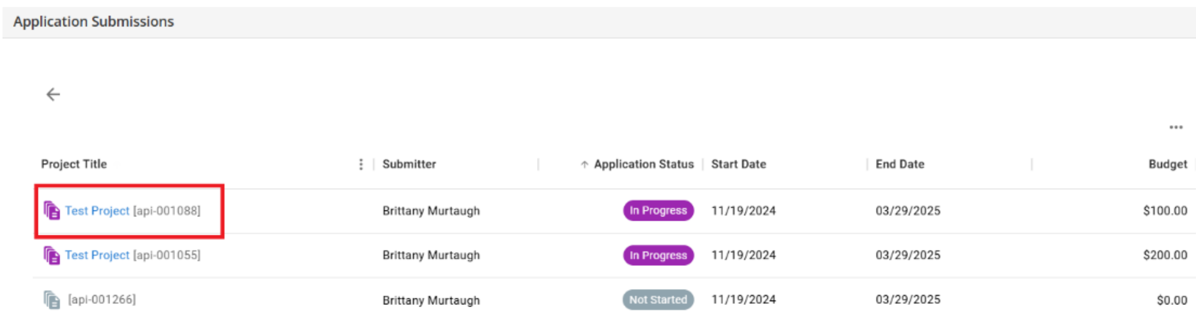
2) The "My Applications" table will show the status of each application initiated in the "Status" column. Submitted applications will have the status of "In Progress" until the application is reviewed.



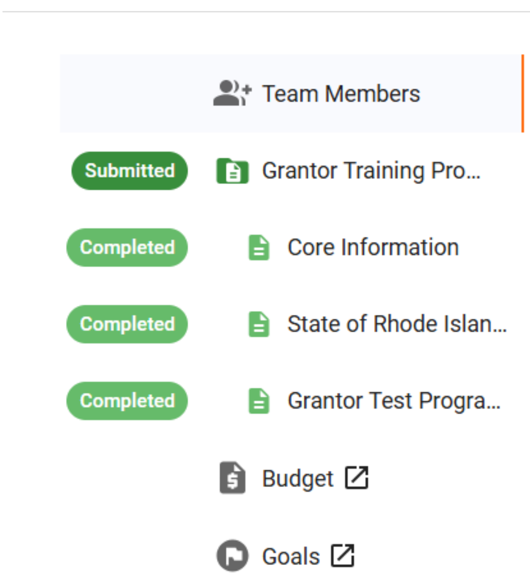
3) Select the hyperlink name of the program to open view the applications submitted for this program and select the Project in question.



4) In the “Application Submissions” table, choose the name of the project.



5) The lefthand toolbar should show a status as “Submitted”.



NOTE: If the application being applied for has multiple Submission Stages, all Submission Stages must be labeled as “Submitted”.

NOTE: See Appendix C for how to export application content.

Part Seven: Next Steps

Now that the application has been submitted, the state agency will review the application. The timeline for reviewing applications is dependent on the state agency and will vary program to program. For questions, refer to the *Contact* tab of the solicitation. In the meantime, there are several steps that can be taken that will be required if awarded grant funding. These can be completed while awaiting a decision.

7.1. Annual Organization Registration

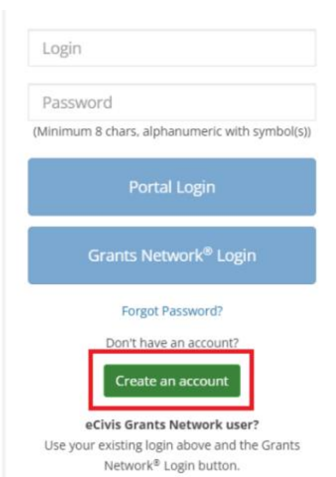
Ensure the entity has completed the Annual Organization Registration. This is a yearly required registration that must be completed before an entity can be awarded grant funding through the State of Rhode Island. For more information, refer to the Resources for Subrecipients – Annual Organization webpage.

7.2. Ocean State Procures Registration

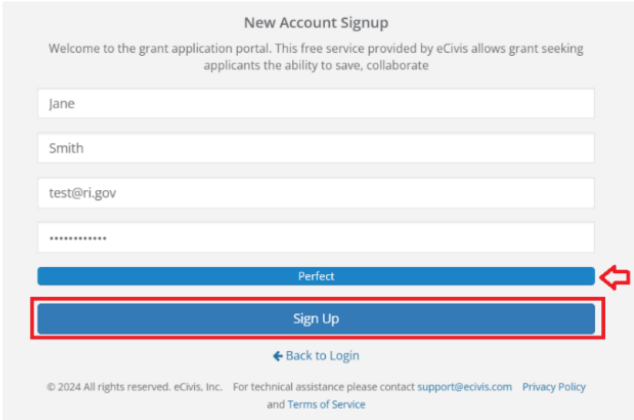
Ocean State Procures in the State of Rhode Island's vendor management system that allows entities to receive payment. This is a one-time registration managed by the Division of Purchases. If previously completed, it would only need to be updated if the entity information changed (i.e. address etc.). Visit the Ocean State Procures Vendor Registration webpage for information on how to complete the registration, and access to a Help Desk for further questions.

Appendix A: How to Create an eCivis Portal Account

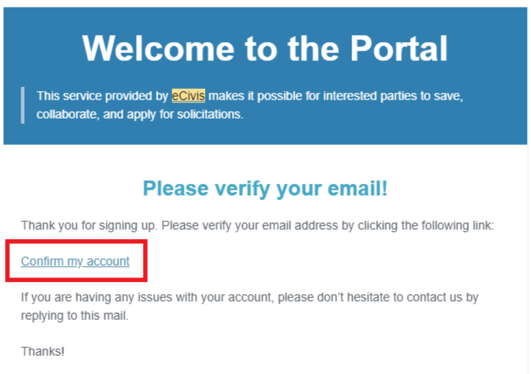
1) Navigate to https://portal.ecivis.com/#/login
2) Select the green *Create an Account* button.



3) Enter required information and choose password. Ensure that the password success bar is blue to indicate a strong password has been chosen. Then, select Sign Up



4) A verification email will be sent to the email provided. Click the link provided in that email. If this link is not selected to verify the email, the user will not be able to gain access to the eCivis Portal account.



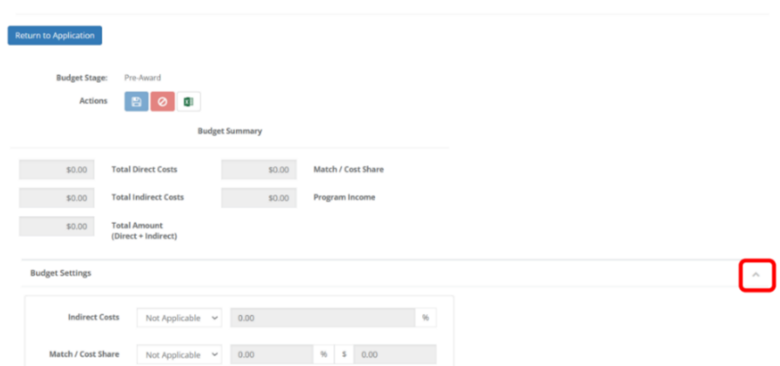
5) Once the email is verified, navigate back to eCivis Portal and login.

NOTE: For other eCivis Portal login issues, refer to the [eCivis Portal – Access and Login user guide](#).

Appendix B: Application Budget Settings

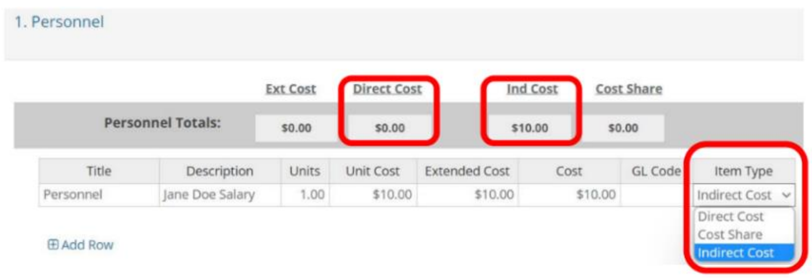
If the grant program requires Match (Cost Share) or Indirect Costs input into the budget, review the guidance below on how to account for that when submitting the application budget as outlined in Part 5.

1) Open the Budget Settings by selecting the grey arrow. Budget Settings allow for change to how the indirect cost rate and cost share (match) is calculated.



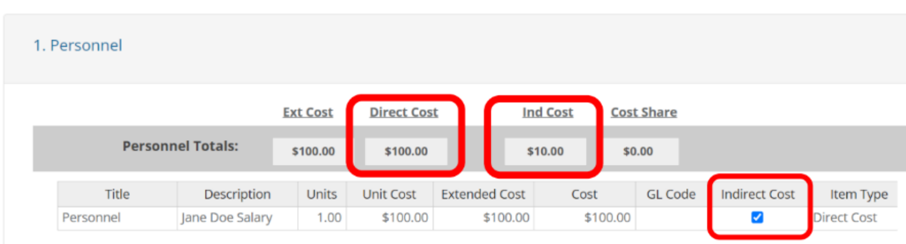
2) From the Indirect Costs drop-down menu, there are several options to calculate the indirect costs:

a. Not Applicable: This option will remove indirect costs from the overall calculation and allow for it to be entered as a line-item entry. If this is selected, an option will be made available in each line item to indicate the type of item (Direct Cost, Indirect Cost, or Cost Share).

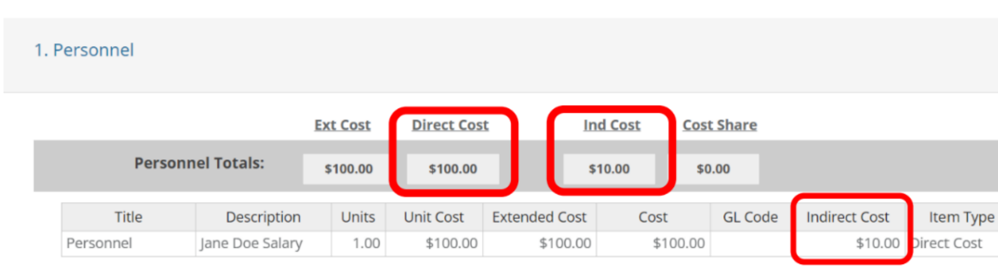


b. De Minimus Rate: This is the standard indirect cost rate (10%) that can be used for a Federal or Pass-through Grant if there is no negotiated rate. The percentage will be applied to each budget line item checked off.

c. Negotiated Rate: This should be used for entities with a negotiated indirect cost rate with the Federal or Pass-through agency administering this program. The percentage will be applied to each budget line item checked off.



d. Itemized: This will change the indirect cost calculation from a percentage of a line item, to a manual entry amount.



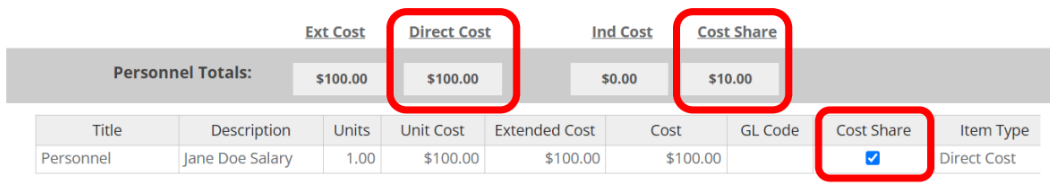
3. From the *Match/Cost Share* drop-down menu, there are several different options to calculate the Match/Cost Share.

   a. Not Applicable: This will remove Match/Cost Share from overall calculation and allow for it to be entered as a line item entry. If this is selected, an option will be made available in each line item to indicate the item type (Direct Cost, Indirect Cost, or Cost Share).

	Ext Cost	Direct Cost	Ind Cost	Cost Share
Personnel Totals:	$100.00	$100.00	$0.00	$10.00

Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Item Type
Personnel	Jane Doe Salary (Match)	1.00	$10.00	$10.00	$10.00		Cost Share
Personnel	Jane Doe Salary	1.00	$100.00	$100.00	$100.00		Direct Cost

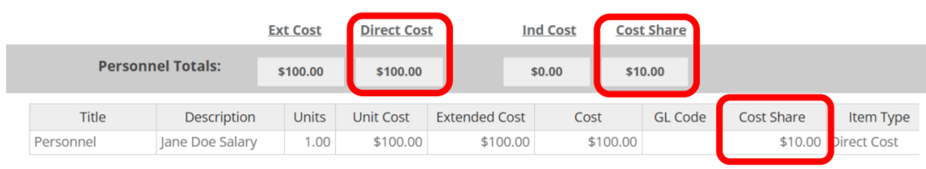
   b. Percentage: This will calculate the Match/Cost Share as a percentage of the budget items included. Below example is with 10% Cost Share rate.



	Ext Cost	Direct Cost	Ind Cost	Cost Share
Personnel Totals:	$100.00	$100.00	$0.00	$10.00

Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Cost Share	Item Type
Personnel	Jane Doe Salary	1.00	$100.00	$100.00	$100.00		☑	Direct Cost

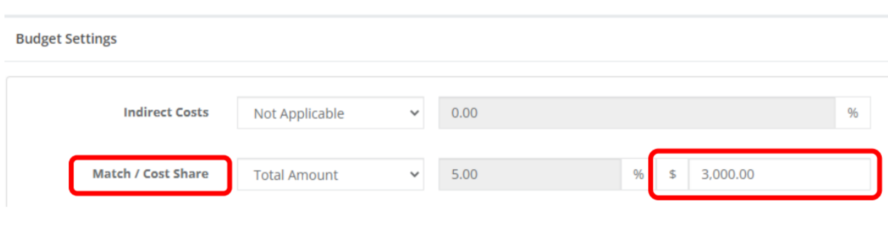
   c. Itemized: This will change the Match/Cost Share calculation from a percentage to a manual entry amount.



	Ext Cost	Direct Cost	Ind Cost	Cost Share
Personnel Totals:	$100.00	$100.00	$0.00	$10.00

Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Cost Share	Item Type
Personnel	Jane Doe Salary	1.00	$100.00	$100.00	$100.00		$10.00	Direct Cost

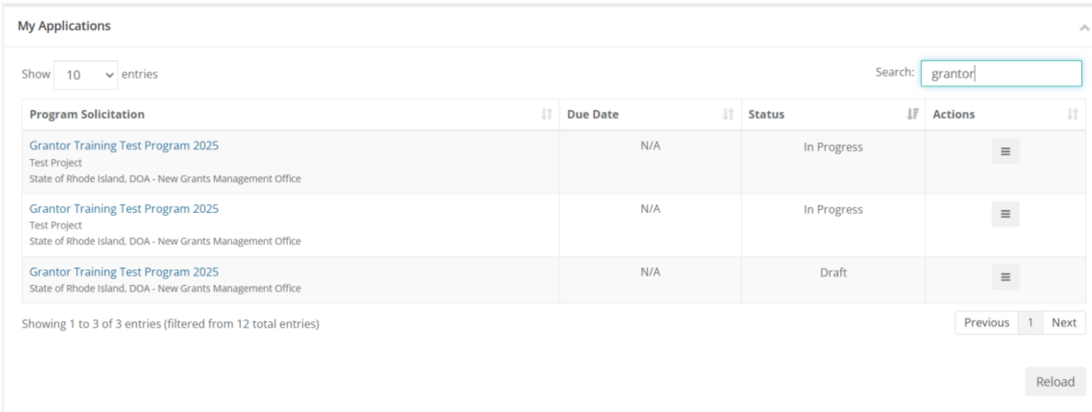
   d. Total Amount: This allows for a single total amount for the Match/Cost Share.



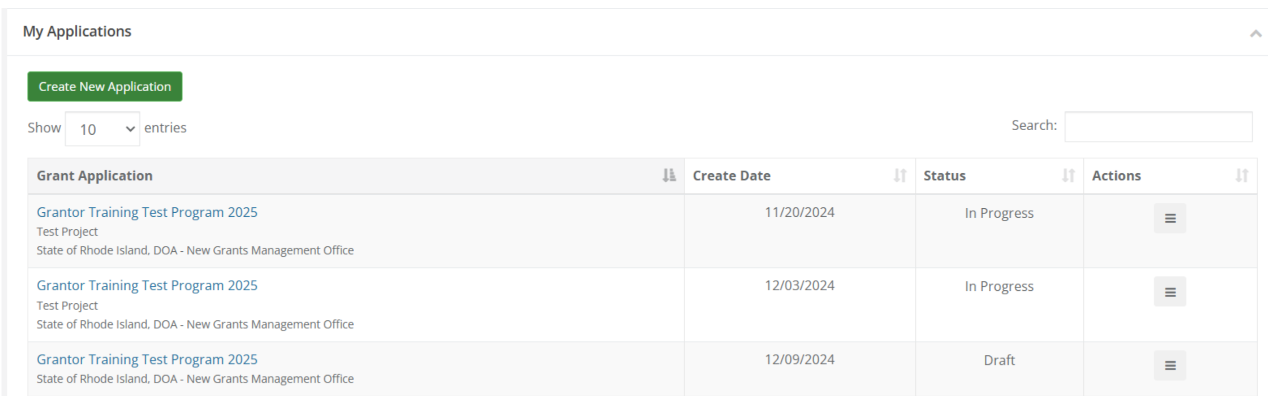
Please refer to the program guidance on indirect cost/match/cost share requirements

Appendix C: Export Application Materials

1) Select *My Applications* from the left-hand navigation bar. Then, use the top-right search bar or sort the headings of this table to find the application.

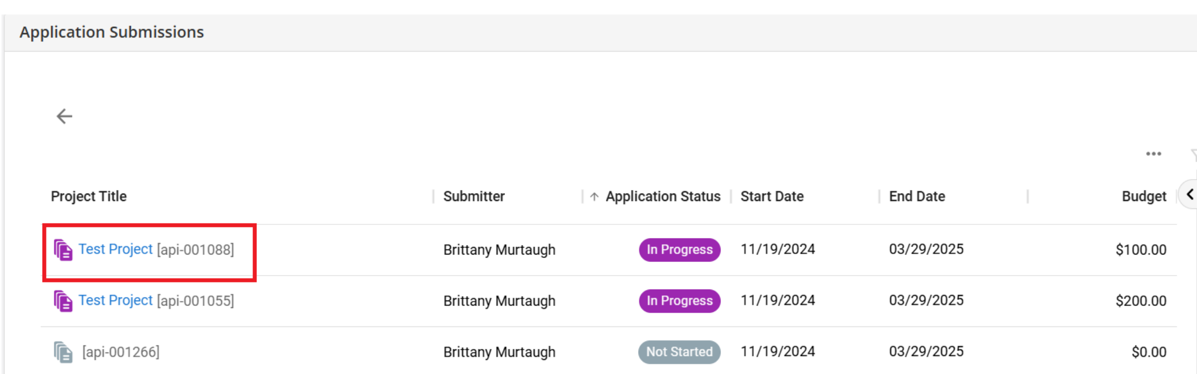


2) The next page will open a table of all applications created for this Program (ability to submit multiple applications is only available at Grantor discretion and may be deactivated).

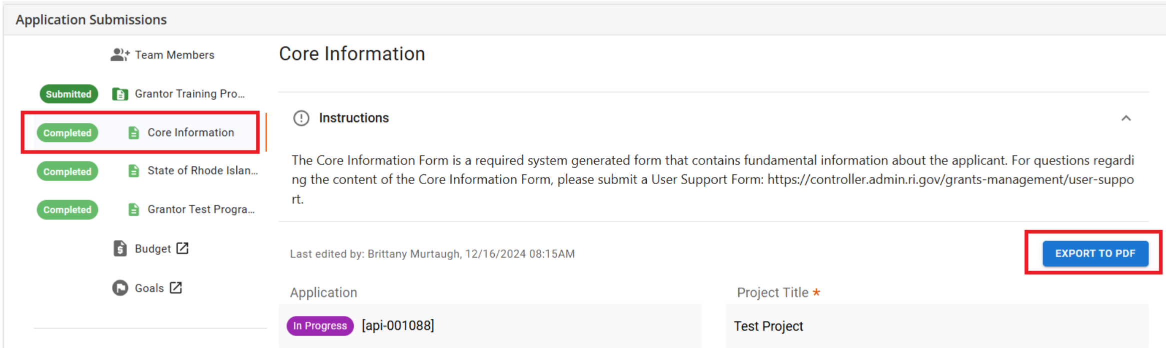


3) Select any of the linked application titles in this table to access the "Application Submissions" window.

4) The "Applications Submissions" window contains a more detailed table of the applications. Select the applicable Project Title to review that application.



5) To export a copy of the filled application form to PDF format, open the form name and select *Export to PDF* from the top-right corner of the page.



6) To export a copy of the budget worksheet, open the "Budget" menu item and click the spreadsheet button at the top of the worksheet.