



State of Indiana eCivis Grants Network Grantor User Guide

Creating a Direct Award Solicitation

January 2025

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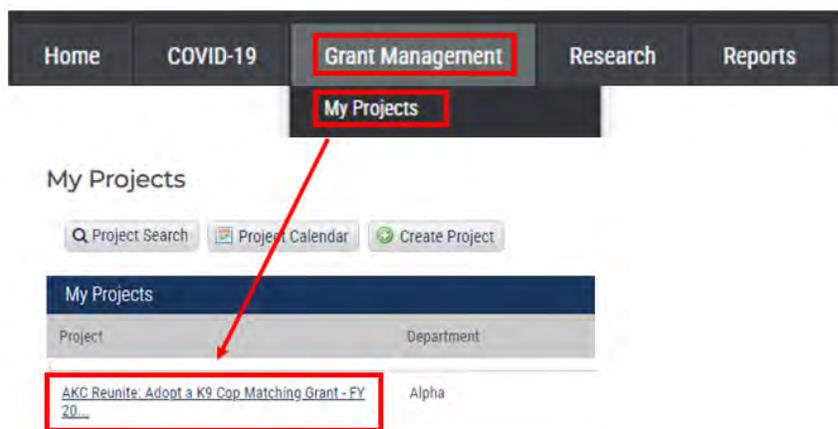
Purpose

The purpose of this user guide is to provide instructions to Agency eCivis users on creating a Direct Award solicitation when the agency already knows who they want to award and does not need to collect any data, other than a budget, from the subrecipient. These steps will allow Agency eCivis users to complete the initial setup of adding the funding source to the Solicitation, create Task Approval groups, edit the solicitation, and initiate the direct award process.

Step 1: Locate a Source of Funds for the Solicitation

This initial step locates and sets up the source of funding that will be utilized in the Grantor solicitation. The source of funding must be attached to an active eCivis Project in the Grantee system, made available for pass-through funding and follow the steps described in this User Guide.

1. On the eCivis Grants Network Homepage, the Agency eCivis user will select My Projects from the Grant Management tab. Then click the name of the eCivis Grants Network project to be used as the source of funding for the solicitation.



2. On the *Project Dashboard*, the Agency eCivis user will select the **Grant Lifecycle** tab and then will click on the *Pencil Icon* for the *Grant Awarded* Stage:



NOTE: If an amendment was processed for the Project, the Agency eCivis user will click on the *Pencil Icon* for the *Grant Amendment* Stage instead of the *Grant Awarded* Stage.

3. A Grant Status form will appear and the Agency eCivis user will scroll down to the **Allocation Option** section and select “Yes” to **Are awarded funds to be available for use as pass-through funding?** This will make the amount entered in the next field available for a Grantor program

The Agency eCivis user must enter the **Amount to earmark for pass-through funding** that will be distributed in their grant program. All State of Indiana Agencies must select “No” to **Are awarded funds to be available for Allocation to sub-projects?** as sub-projects will not be used in eCivis.

Allocation Option

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

Amount to earmark for pass-through funding*:

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

4. The Agency eCivis user will click the *Save > button* to proceed and repeat the above steps selecting a different Grantee project if additional funding sources are needed.

Step 2: Process Guidance and Subrecipient Communications

SBA has created a best practice document for your internal agency staff and external subrecipients/grantees. An outline of this information is provided below.

1. Grantor Process Guidance
 - a. 8-weeks Prior to Announcement of Opportunity
 - b. 6-weeks Prior to Announcement of Opportunity
 - c. Award Phase
 - d. Contract Start
2. Subrecipient Communications Planning
 - e. Subrecipient eCivis Communications Steering Committee
 - f. Subrecipient Stakeholders
 - g. Key Messages
 - h. Communications Tools
 - i. Schedule and Workplan

Sample Timeline

Solicitation construction begins	4/15/2024
Solicitation construction Ends	4/30/2024
<i>48 hours to configuration (receive the Zengine Application building space)</i>	
Workspace configuration	5/1/2024
<i>3 weeks to build application, scorecard, and then walk through with SBA to proof and with a week cushion</i>	
Application/Scorecard Construction	5/24/2024
Application Begins	6/3/2024
Application end	7/5/2024
Notify Applicants	7/29/2024
Project period	10/1/2024

NOTE: The schedule above is for competitive programs. Direct Award Programs do have the potential to have a shorter timeline, please contact SBA for more guidance.

Step 3: Create a Solicitation for Direct Award

In some circumstances, Agencies will not require applications to award grants funds. In these scenarios, you can use the eCivis Direct Award process.

1. From the eCivis Grants Network homepage, under the **Grant Management** tab, the Agency eCivis user will select *Subrecipient Management*. The **Program Dashboard** page will appear showing a complete list of all previously created solicitations. At the top of the page, the Agency eCivis user should click the *Add New Program > button*.



When the **Create New Program** window appears, the Agency eCivis user will fill in the required information:

- a. **Program Name:** This name will appear internally/externally and can be revised if needed.
- b. **Solicitation Type:** Direct Award Process
- c. **Department:** Using the dropdown menu, the Agency eCivis user will select the Department that will manage the Program. The Agency eCivis user will only have access to the Department(s) they are associated with in the Grantee module.
- d. **Template Application:** This option will be greyed out since you chose Direct Award Process.
- e. **Listing:** The Agency eCivis user will select the solicitation listing type by selecting either *Public* or *Private*.
 - *Public* listings will appear on the eCivis Grants Network Public Solicitations Listing page. This is the State of Indiana recommended selection. (For example, it is visible on the public-facing [State Agency Grant Opportunities website](#).)
 - *Private* listings will not appear on the eCivis Public Solicitations Listings page and can only be accessed by providing your applicant a direct link to your solicitation.
- f. **Subprogram:** The Agency eCivis user should select *No* in response to whether the program solicitation is a subprogram, as this functionality is not available to the State of Indiana.

The Agency eCivis user will click the *Create Program > button*.

Create New Program

Please enter a name for your new program:
 a

Please select a solicitation type:
 b

Please select a department:
 c

Please select a template application:
 d

Listing:
 Public **e**
 Private

Is this program a subprogram?: **f**
 Yes
 No

Create Program

2. If you are not taken directly to the **Solicitation Edit** page, click the *Edit Solicitation > Button* as shown below. The **Solicitation Edit** page is where the Agency eCivis user builds out the solicitation. Initially, each section header is marked with an “X” indicating that it is incomplete. Once a section is completed, the section header will be marked with a green checkmark. To request an application workspace or publish a solicitation, all section headers must have a green checkmark.

Program Detail

marine highways mon 20 **Draft**

Department: Alpha
 Total Funding: \$3,000,000.00
 Application Period: 07/01/2024 - 12/31/2024

X = Incomplete **✓ = Completed**

Overview X	Eligibility X	Financial X	Contact X	Files X	Submission X	Goals X	Approval X
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3. **Overview:** The Agency eCivis user should enter the information requested in this tab. Please note the required fields are indicated with an (*). All Overview information will be visible to the applicants.

- a. **Title:** Grant program name.
- b. **Fiscal Year:** The applicable State Fiscal Year (SFY) or Federal Fiscal Year (FFY) for the program.
- c. **Application Start Date:** The is left blank since you are not collecting any information in the form of an application.
- d. **Application End Date:** The is left blank since you are not collecting any information in the form of an application.
- e. **ID:** Any other grant program identifier.
- f. **CFDA/ALN:** Catalog of Federal Domestic Assistance number, if applicable (Assistance Listing Number).

- g. **Reference URL:** A link to a website for the grant program, if available. Otherwise, this field will remain blank.
- h. **Listing Availability:** Public or Private. (selecting public will place this program on the SBA Public Solicitation Listings page). Public is the recommendation.
- i. **Summary:** Provide any narrative information that is appropriate regarding the grant program such as its purpose.

The Agency eCivis user will click the *Save > button* once the **Overview** section is complete.

The screenshot displays the Agency eCivis application form. At the top, there is a navigation bar with tabs for Overview, Eligibility, Financial, Contact, Files, Submission, Goals, and Approval, each with a red 'X' icon. The Overview tab is active. Below the navigation bar, the form is divided into two main sections. The left section contains several input fields, each with a red letter indicating a required field: Title (a), Fiscal Year (b), Application Start Date (c), Application End Date (d), ID (e), CFDA/ALN (f), Reference URL (g), and Listing Availability (h). The Listing Availability field has radio buttons for Public (selected) and Private. The right section is titled 'Summary' and is marked as 'Step 1 of 9'. It contains a rich text editor with a toolbar and a 'Save' button highlighted with a red box. A 'Done' button is also visible. A note at the bottom of the Summary section reads: 'Use the tabs to complete the solicitation. Make sure to click Save when making changes.'

4. **Eligibility:** The Agency eCivis user should enter the information requested on this tab. Please note that the required fields are indicated with an (*). All Eligibility information will be visible to the applicants.

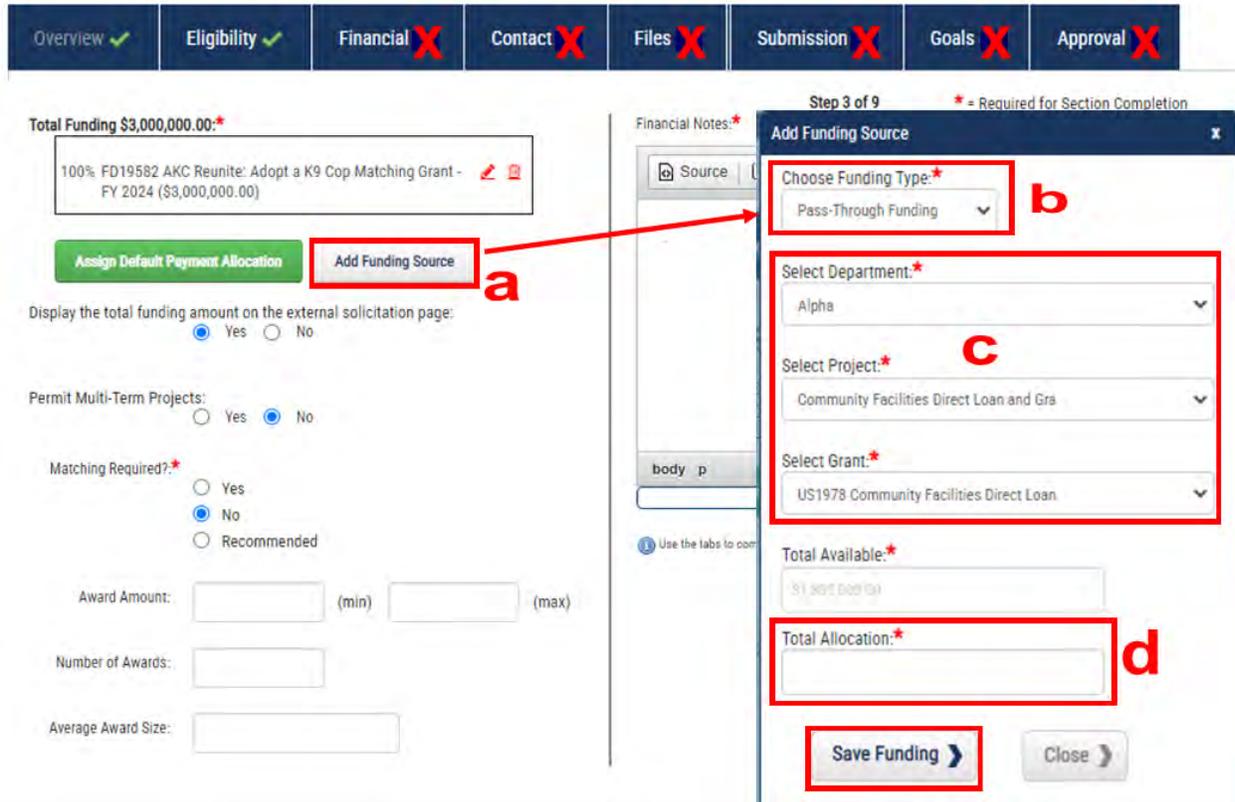
- a. **Eligible Applicants:** Select all that apply.
- b. **Eligibility Notes:** Provide any additional eligibility information that may assist applicants with determining if they are eligible and/or their projects are eligible.

The Agency eCivis user should click the *Save > button* once the **Eligibility** section is complete, then proceed to editing the next section.

5. **Financial:** In the **Total Funding** section, the Agency eCivis user will begin by adding the eCivis Grants Network funding source(s) to the solicitation. The required fields are indicated with a *red asterisk* (*). All Financial information will be visible to the applicants.

- a. The Agency eCivis user will click the *Add Funding Source > button*.
- b. All Agencies must select *Pass-Through Funding* in the funding type drop-down box.
- c. The Agency eCivis user will select the corresponding department, project, and grant from the dropdown boxes. The **Total Available** field will populate with the funding source's total funds available.
- d. The Agency eCivis user will enter the amount of funds allocated to this program in the **Total Allocation** field. The total allocation cannot be more than the total available.

Once the Financial section is complete, click the *Save Funding > button*.



Repeat the steps above if multiple funding sources need to be associated with this Solicitation. Once the eCivis funding source(s) is added, click the *Assign Default Payment Allocation > button*.



e. Funding Source Default Payment Spread: If this program utilizes multiple funding sources, the Agency eCivis user may enter the percentage for each default payment for each funding source(s) and click the *Save > button*.

NOTE: If there is only one Funding Source, the Agency eCivis user will input “100%”. Alternatively, you can enter the percentage when approving a financial report.

Select or enter a response to the following questions:

- e. **Display the total funding amount on the external solicitation page:** Selecting *Yes* or *No* will display the amount entered from the Total Allocation in the Financial section.
- f. **Permit Multi-Term Projects:** All Indiana agencies must select *No* as this functionality was built for another eCivis client and will not work for Indiana.
- g. **Matching Required:** Selecting *Yes/Recommended* will initiate a dropdown menu to appear and the Agency eCivis user must select the **Matching Type** from *Cash, In-Kind, or Cash/In-Kind*.
- a. **Award Amount (min) and (max):** An Agency eCivis user can select to enter both a min and max, or just one of these, to inform the applicants.
- b. **Number of Awards:** If no data is entered, it will appear as “N/A” in the external solicitation.
- c. **Average Award Size:** If no data is entered, it will appear as “N/A” in the external solicitation.
- d. **Financial Notes:** An Agency eCivis user can provide more information as it relates to the eligible, allowable costs (or non-allowable costs) along with any other information.

Once the **Financial** section is complete Click the *Save > button*.

6. **Contact:** This information can be used to contact the grant program manager/office with questions and will be included with some of the automated emails that come from

eCivis i.e. Direct Award Notice, Application Denied message, Application Award Notification. Please note that the required fields indicated with an (*) must be provided. All Overview information will be visible to the applicants.

- a. **Agency Department:** The Indiana State Agency associated with initiating the solicitation will automatically appear here.
- b. **Contact/Help:** This is the email address you want your applicants to contact for any questions while they are filling out their application and/or accepting their award, if applicable. This email address will be the default email recipient of communication on this solicitation.
- c. **Office:** A specific office within an Indiana State Agency.
- d. **Program Contact:** Contact information for the Program Manager or other points of contact.
- e. **Application Address:** It is recommended to click the *Program Contact & Application Address are the same* option. This duplicates the previous selection.
- f. **Contact Notes:** Any additional contact notes necessary for applicants. SBA does recommend including the following information for technical questions.

For technical support with the eCivis platform, please review the SBA: NextLevel Grants Management website. <https://www.in.gov/sba/grants/resources-for-subrecipients/>

Once the **Contact** section is complete, click the *Save > button*.

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

Agency/Department: Alpha **a**

Contact/Help: * **b**

Office: **c**

Program Contact: * **d**

Program Contact & Application Address are the same.

Application Address: * **e**

Contact Notes: * **f**

Step 4 of 9 * = Required for Section Completion

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

Save > Done >

7. **Files:** Enter the information requested in this tab as appropriate. Please note that the required fields are indicated with an (*). All Files information will be visible to the applicants.

- g. **Current Files:** Click the *Add File > button* to upload any supplementary documents that will be needed by applicants during the application submission process. Some examples include:

- Notice of Funding Opportunity (NOFO)
 - Frequently Asked Questions (FAQs)
 - Additional budget or financial spreadsheet
 - Select appropriate File Label from the drop-down menu:
NOFA, Application, Budget, Guide, FAQ, Other.
- h. **Application Submission Notes:** Agency eCivis users will leave this part blank as eCivis no longer uses this field.
- i. **File Notes:** Details or instructions about the use of each file included.

Once the **Files** section is complete, click the *Save > button*.

8. **Submission:** In the Submission Tab, you will manage important settings for your submission and subrecipient portal. Please note that the required fields are indicated with an (*). All Submission information will be Agency facing and not visible to the applicants.

b. Accept multiple applications per user: Will determine whether applicants can submit more than one application on this program. This selection cannot be changed once the solicitation is published.

c. Budget Development: Indiana requires “yes” selection. You **must** use a budget in your grant program even if you only use a single budget category for all expenses.

d. Budget Template: Indiana requires Agencies to select either the “SOI Program Budget” or “SOI Construction Budget” from the dropdown menu. This selection cannot be changed once the solicitation is published.



Accept multiple applications per user*

Yes No

b

Note: Once a solicitation has been published, this selection may not be changed.

Budget Development:*

C

Would you like your applicants to create a budget within the eCivis Portal? This will also be used to track spending during post award.

Yes No

Note: Once a solicitation has been published, the budget template may not be changed.

SOI Program Budget

d

- e. **Contract Number:** The Agency will select “No” so the eCivis system cannot autogenerate a Contract Number.
- f. **Collect Detailed Financial Reports:** Selecting this box will require subrecipients to enter a GL code and description from a pre-determined list created by the agency for a budget category or spending report. SBA suggests not selecting this box. If the box is selected, then the Agency eCivis user will need to click the **Detailed Financial Report Options** and begin creating the GL codes and Descriptions pick list. For help on this selection, please reach out to the SBA team.
- g. **Require Invoice Number on financial reports:** This needs to be left unchecked for all Agencies. An Invoice Number is required when the Financial Report is approved by the agency. If you check this box, the initial approver will need to enter invoice number. Program staff are typically the first approver and do not have this information available.
- h. **Require Receiver ID on financial reports:** SBA recommends leaving this unchecked as this field is not being utilized. If you check this box, the initial approver will need to enter a value in this field prior to approving the report.
- i. **Track program income with Finance Reports:** Leave the default selection as it is.

Contract Number.*

Would you like to have Grants Network autogenerate a contract number when an award is made?

- Yes No **e**

Prefix:

Note: Contract Number prefix must be unique for your Organization. A -XXXX will be appended to all contract numbers.

- Collect Detailed Financial Reports **f**
- Require Invoice Number on financial reports **g**
- Require Receiver ID on financial reports **h**
- Track program income with Finance Reports **i**
 - Additive
 - Subtractive
 - Apply to match

j. Submission Notes: This textbox should be used to provide instructions to the eCivis customer service representative regarding configuration of the application/ submission process for this solicitation. These notes will not appear to applicants. Follow the guidance provided on this screen by entering detailed information about the date and time of the submission deadline (please include EST).

Once the **Submission** section is complete click the *Save > button* to proceed.

Step 7 of 9 * = Required for Section Completion

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

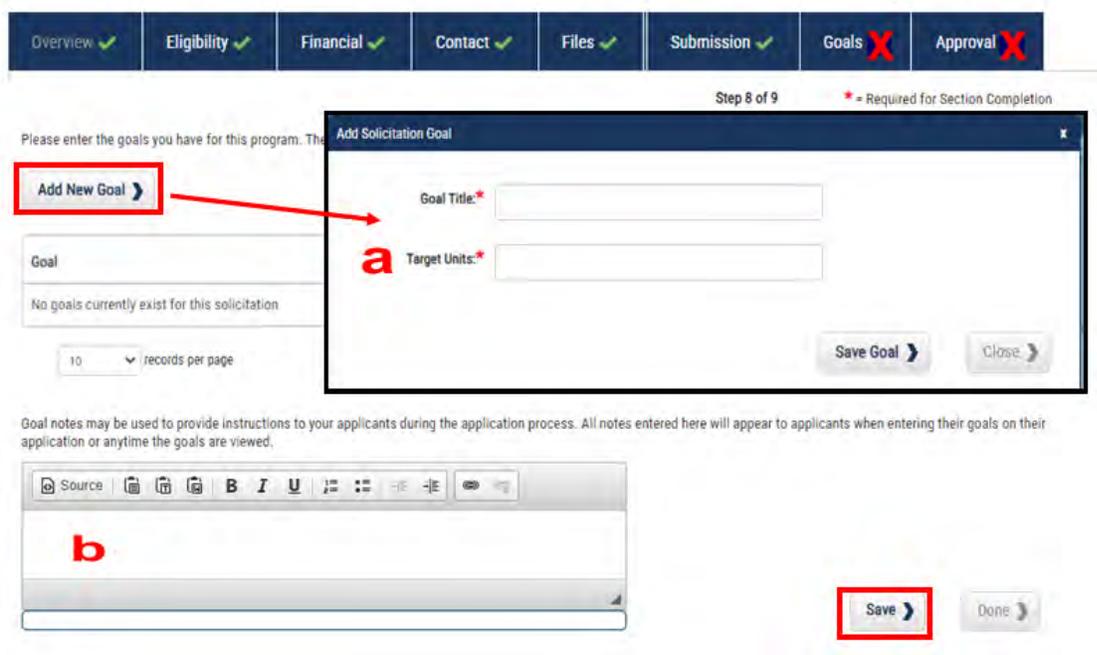
Note: All application submission deadlines default to 11:59 EST. If you would like your application period to close at a different time, please indicate the time and time zone, in the notes section below.

j

9. **Goals:** This section is not mandatory by SBA so if goals will be included in the application and reported on by subrecipients in the post-award grantor process then those descriptions should be set here.

- a. **Add Solicitation Goal:** Click the *Add New Goal > button* to get started. Enter the Goal, Title, and Target Units (in numbers only) then click *Save Goal > button* to continue. Please note that the required fields are indicated with an (*). Additional fields will appear, including the option to *Add Subgoal* for further specification that can include text and numerical specification. Repeat these steps as needed to add multiple goals to your program.
- b. Enter in goal notes to provide instruction to your applicants during the application process.

Once the **Goal** section is completed click the *Save > button* to proceed.



10. **Approval:** All Approval information will be Agency facing and not visible to the applicants. The Agency eCivis user can view the Task Type descriptions by clicking the *Information > button* located to the right of each task name. The Agency eCivis user will assign the task to the appropriate team member on the Agency side by clicking the *Pencil Icon > button* on the right side of the task row:

Overview ✓	Eligibility ✓	Financial ✓	Contact ✓	Files ✓
Please define an approval workflow for each of the tasks below*				
Task Type	Approver	Workflow		
Recommendation Approval ⓘ		Undefined		
Final Award Approval ⓘ		Undefined		
Activity Report Approval ⓘ		Undefined		

Each task will ask the Agency eCivis user to designate an approval type. Please note that the required fields are indicated with an (*):

- **Standard:** Requires an approval by an assigned approver or member of an approval group. In a group, once any member approves the task, it is considered complete.
- **Sequential:** Requires each approval group member to approve in a specific order, one after another.

Based on the approval type, the **Designated for Approval** option can either be set to User or User Group. You will then need to select the User, by Department, or User Group.

Once the Approval section is complete click the *Save > button* to proceed until all eleven tasks are completed.

Select Approval Workflow

Define a workflow for the Award Recommendation Approval Task

Approval Type:* **a**

Standard ⓘ Sequential ⓘ

Designated for Approval:* **b**

User
Choose a user that will be designated as approver

Select Department: ▾

User Group
Choose a user group that will be designated for approval. The group is based off Approval Type selected above.

Save > Close >

Step 4: Approval Tasks and Extra Assignment Steps

All eleven **Approval Tasks** require an Approval Type and selection in the Designated for Approval section. Below is a definition of each Approval Task Type. If any of the eleven tasks require multiple approvers, go to [Step 5: Create/ Manage Approval Groups for the Solicitation](#) of this user guide for additional guidance.

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

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

Step 8 of 8 * = Required for Section Completion

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

Award Files

No data available in table

Add File

Task Notifications

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

None Weekly

1. **Recommendation Approval:** The Agency eCivis user assigned to this task will review the award recommendation created in eCivis. The Agency eCivis user can work with the applicant to make final budget adjustments, if needed, during this step.

2. **Final Award Approval:** The Agency eCivis user assigned to this task will review any award accepted by an applicant. The award recommendation will need final approval from the Agency eCivis user before an application enters awarded status.

3. **Activity Report Approval:** The Agency eCivis user assigned to this task will review and approve any activity/program report submitted by a subrecipient. Additionally, you can enter instructions for the subrecipient to utilize when submitting an activity report

Select Approval Workflow

Define a workflow for the Activity Report Task

Approval Type:*

Standard Sequential

Designated for Approval:*

User

Choose a user that will be designated as approver

Alpha

Mark O'Malley

Instructions:

Source

instructions for approvers go here.

The Agency eCivis user can also define a frequency for the Activity Report Task Info by setting the interval and specifying the start and end dates. Once the task assignment is finished, click the *Save > button* and proceed to the next task.

Define an optional frequency for the Activity Report Task

Frequency: Monthly

Interval:*

Every month

On:*

A day of the month

1

The last day of the month

Starting:*

08/01/2024

Until:

07/01/2025

4. Financial Report Approval: The Agency eCivis user assigned to this task will review and approve any financial report/reimbursement request submitted by a subrecipient. Additionally, you can enter instructions for the subrecipient to utilize when submitting a financial report.

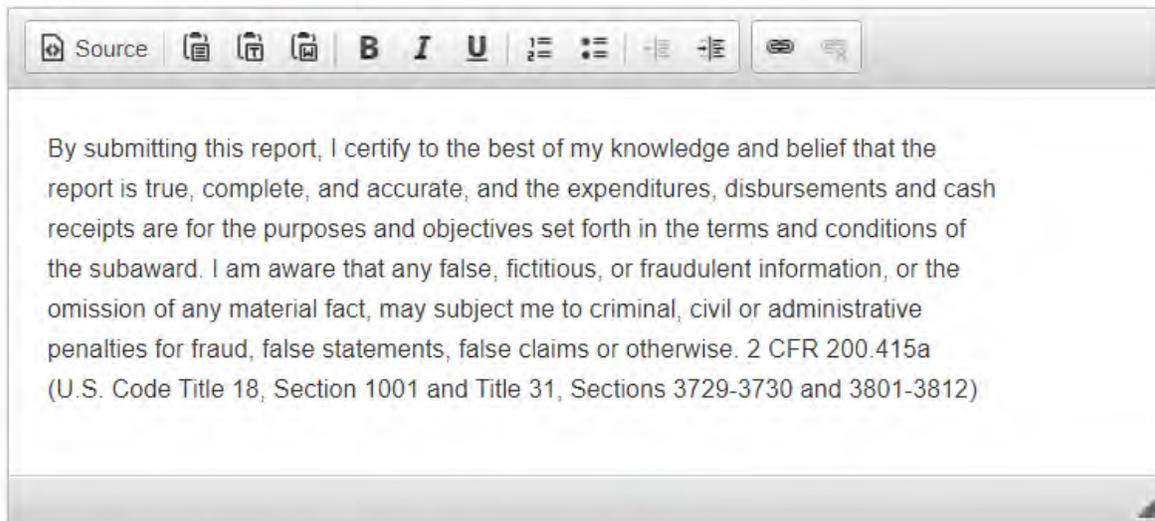


When completing this task setup, the Agency eCivis user will leave the “*Display acknowledgment statement*” as Yes. The **Acknowledgement Statement** in the dialogue is Uniform Grant Guidance and must not be changed by the Agency eCivis user.

Display acknowledgement statement:^{*} 

Yes No

Acknowledgement Statement:^{*}

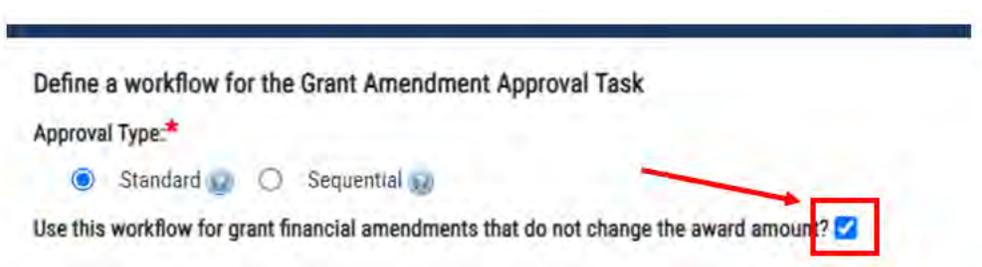


Edit the default Uniform Guidance acknowledgement (not recommended)^{*}

Yes No

The Agency eCivis user can also define the frequency for the **Financial Report Task** just like in the **Activity Report Task** section above. Once the task assignment is finished, click the *Save > button* and proceed to the next task.

5. Amendment Approval: The Agency eCivis user assigned to this task will review and approve any Amendment requests initiated **by the subrecipient**. If you want to use this workflow for financial amendments that do not have financial impact to the award amount, be sure to check the box as indicated below.



Once the task assignment is finished, click the *Save > button* and proceed to the next task.

6. Amendment Approval with Finance: The Agency eCivis user assigned to this task will review and approve any Amendment requests initiated **by the Subrecipient** involving a financial change. Once the task assignment is finished, click the *Save > button* and proceed to the next task.

7. Grantor Amendment Approval: The Agency eCivis user assigned to this task will review and approve the amendment initiated by the Agency/Grantor after the subrecipient has approved the amendment in the eCivis Portal. Once the task assignment is finished, click the *Save > button* and proceed to the next task.

8. Grantor Amendment Approval with Finance: The Agency eCivis user assigned to this task will review and approve the amendment **WITH** a financial change that has been initiated by the Agency/Grantor. This approval will occur after the subrecipient has approved the amendment in the eCivis Portal. Once the task assignment is finished, click the *Save > button* and proceed to the next task.

9. Grantor Amendment Final Approval: The Agency eCivis user assigned to this task will review and approve the amendment once reviewed/approved by the Agency eCivis user in the previous Amendment Approval tasks above. This is the final approval in the amendment process with or without a financial change. Once the task assignment is finished, click the *Save > button* and proceed to the next task.

10. Return of Funds Approval: The Agency eCivis user assigned to this task will review and approve a return of funds that is initiated by the Agency/Grantor. Once the task assignment is finished, click the *Save > button* and proceed to the next task.

11. Closeout Approval: The Agency eCivis user assigned to this task will review and approve the final Financial Report from the Subrecipient. All Financial Reports and Amendments must be in the Approved status for the Subrecipient to initiate Award Closeout. Any Activity reports that are Pending Approval will be automatically

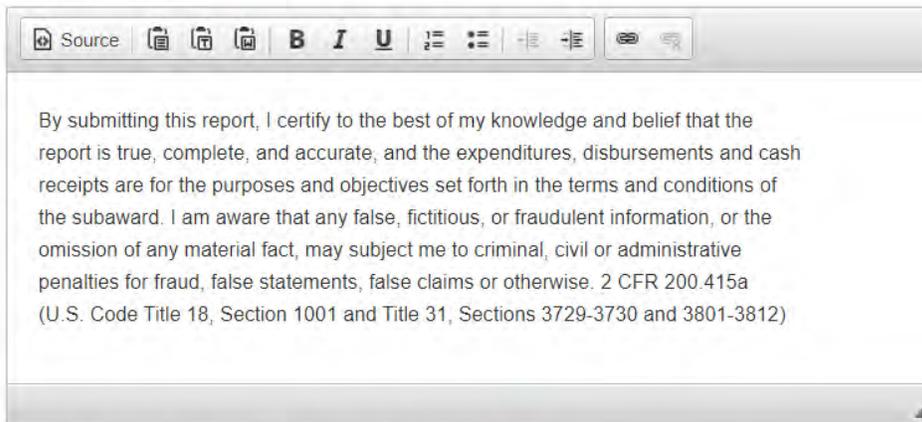
approved when the grantor accepts this report. Any unspent funding will be unavailable to request for reimbursement after this report has been submitted.

When completing this task setup, the Agency eCivis user will leave the “*Display acknowledgment statement*” as Yes. The **Acknowledgement Statement** in the dialogue is Uniform Grant Guidance and must not be changed by the Agency eCivis user.

Display acknowledgement statement.* 

Yes No

Acknowledgement Statement.*



A rich text editor window with a toolbar containing icons for Source, Undo, Redo, Bold, Italic, Underline, Bulleted List, Numbered List, Decrease Indent, Increase Indent, and Link. The text area contains the following text:

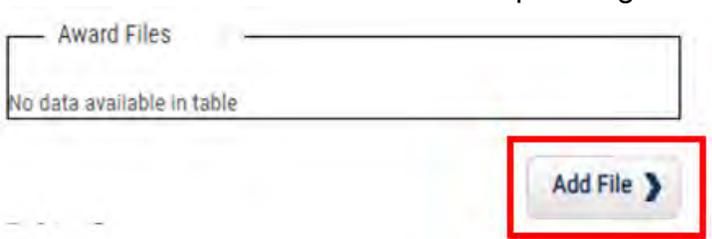
By submitting this report, I certify to the best of my knowledge and belief that the report is true, complete, and accurate, and the expenditures, disbursements and cash receipts are for the purposes and objectives set forth in the terms and conditions of the subaward. I am aware that any false, fictitious,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

Edit the default Uniform Guidance acknowledgement (not recommended)*

Yes No

Once the task assignment is finished, click the *Save > button* and proceed to the next task.

•**The Award Files** button allows the Agency eCivis user to include any common documents that all subrecipients will need as part of the award package. Just click the *Add File > button* and follow the uploading directions.



A section titled "Award Files" with a text area containing "No data available in table". Below the text area is a button labeled "Add File" with a right-pointing arrow, which is highlighted with a red rectangular box.

If you have subrecipient specific documents, you can attach those files during the awarding process for that individual subrecipient. This step is optional.

Once the approval workflows are defined for ALL the **Task Types**, this step is completed; click the *Save > button* to proceed.

Step 5: Sending the Direct Award to Select Groups

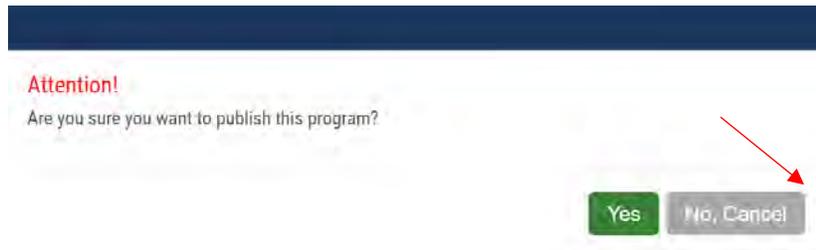
1. Once the Indiana State agency thoroughly reviews each section of the solicitation and ensures that all section header tabs are marked with a green check mark, the solicitation is ready to be Published. Click the *Done* button on the bottom right-hand side of any of the Solicitation screens.

2. The Agency eCivis user will be taken to the program dashboard. Find/Search for the program that needs Published. Click on the *Actions > button* to the right of the program name's Title and select **Publish Solicitation**.

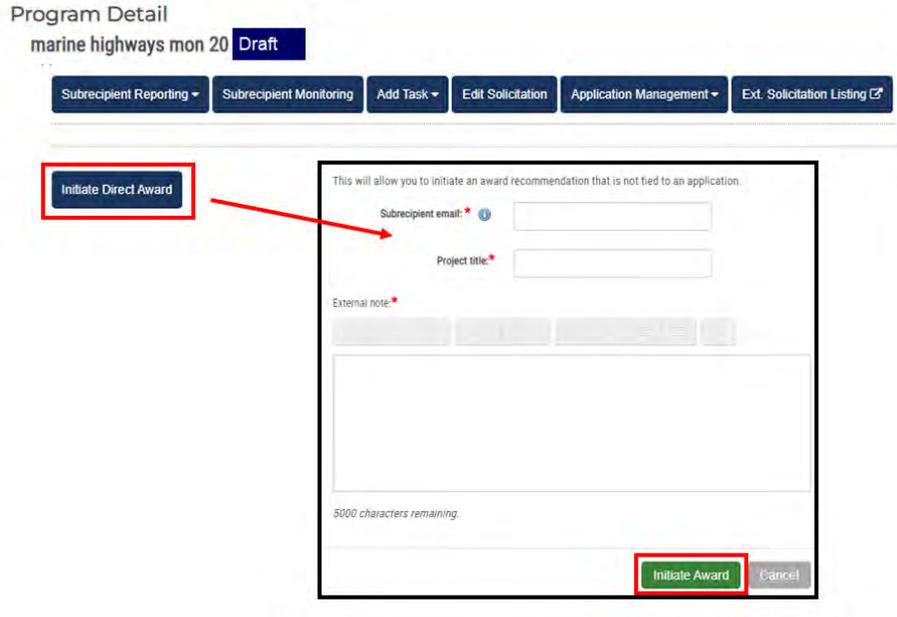
Program Solicitations 1 Hide Closed Programs

Department	Title	Program Type	Status	Total Funding	Actions
Department 11	David Direct Award	N/A	Draft	\$100,000.00	Actions
Department 11	JShopteese Direct Award FY24	N/A	Draft	\$19,250.00	View detail Edit Solicitation Publish Solicitation Delete
Department 12	LOsos - Direct Award Training 1 (TEST)	N/A	Draft	\$997,685.32	
Department 11	Preed INDOT Test Direct Award	N/A	Draft	\$10,000.00	

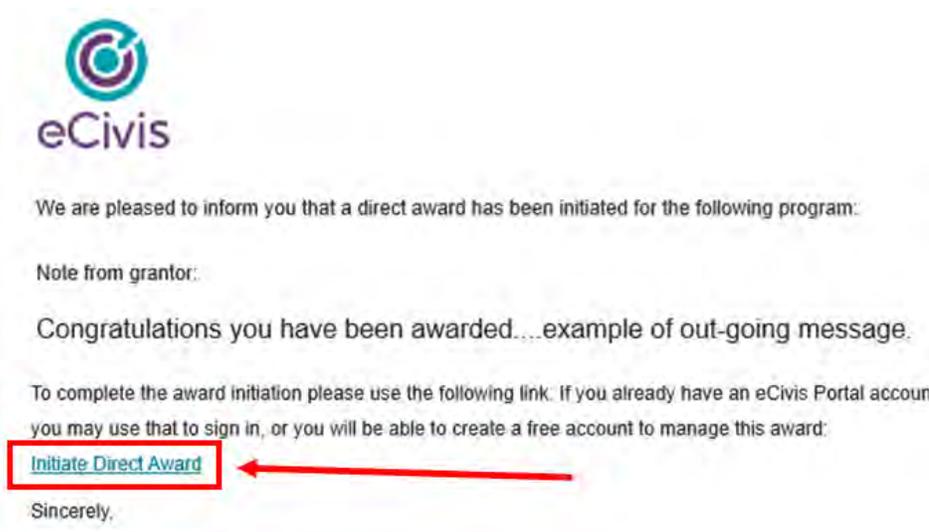
3. An additional pop-up window will appear. Click the **Yes** button to publish your solicitation.



4. Once the solicitation is created and published, it will be time to send the link to specific audiences the Agency chooses to work with. On the **Program Detail Page**, the Agency eCivis user will click the *Initiate Direct Award > button*.



1. When the pop-up appears, the Agency eCivis user will fill in the subrecipient's email address, the Project title, and add a note to the subrecipient explaining that they need to accept their award in the eCivis Portal.
2. The Agency eCivis user will click the *Green Initiate Award > button*. After the *Initiate Direct Award > button* has been clicked, an automated email from eCivis will be sent to the subrecipient. The email will ask the subrecipient to click the *Initiate Direct Award link*, which takes them to the eCivis Portal.



3. The subrecipient will be asked to log in to the eCivis Portal. If this is the subrecipient's first time interacting with the eCivis Portal, the subrecipient will have to click the *Create Account > button* and create an eCivis Portal account before accepting the award from the agency.

4. Once the subrecipient is logged in, the next step will be to fill out some initial information to return to the agency. Once the information is completed the subrecipient will click the *Continue* > button. Declining the award is always an option, but that will completely sever the process, and the agency must start over if the Subrecipient clicked the decline button by accident.

State of Indiana - DEMO
Indianapolis Airport Unite

Before State of Indiana - DEMO can set up your award package, we need some basic information from you. If

Direct Award Initiation

Organization Details

Organization Name: *

EIN:

Project Title: * Indianapolis Aviation for High Schoolers

Authorized Representative

Continue Decline Award

5. Receiving a green processing message is an indicator that the acceptance was successful. The subrecipient will now be able to see the status of their Award in their portal set to *Pending Direct Award*

You have successfully initiated this direct award.
You will receive an email from the grantor when this award is ready to finalize.

My Awards

Show 10 entries

Grant Title	Project Title	Award Status	Actions
Indianapolis Airport Unite	Indianapolis Aviation for High Schoolers	Pending Direct Award	
Polaris Grant Program	Marion County Safety Program	Pending Acceptance	

Showing 1 to 8 of 8 entries

6. The award will now show in the Pending Awards section of the Grants Network **Program Detail** page, which will signify the subrecipient’s acknowledgment of the award. The agency will need to click on the *Actions > button* and then the *Create Recommendation > button*.

Pending Awards Include Rejected Awards

Project	Org Name	Award Manager	Award/ Contract Number	Recommendation Status	Current Approver	Priority	Actions
Marion County Safety Group	Marion County Safety Group			Recommendation Pending	N/A		<div style="border: 1px solid red; padding: 2px;">Actions</div> <div style="border: 1px solid red; padding: 2px; margin-top: 5px;">Create Recommendation</div>

7. The **Award Recommendation Approval Task Creation** form will appear. Complete the form and ensure all required information indicated by an asterisk is provided:

- a. **Recipient:** auto-populated based on the recipient’s name pulled from the application.
- b. **Project:** auto-populated based on the eCivis project name pulled from the application.
- c. **Subrecipient:** Select the appropriate option from the dropdown menu. This list uses a type ahead feature. It is populated from a PeopleSoft data feed. If you are unsure of your subrecipient, please ask your fiscal contact at your agency.
- d. **Payment Profile:** This is the remit address of the subrecipient. This is represented by a number. This is populated from a PeopleSoft data feed. If you are unsure of the correct remit number, please ask your fiscal contact at your agency.
- e. **Subrecipient Risk:** If a risk assessment was conducted on the subrecipient select High, Medium, or Low from the dropdown list.
- f. **Priority:** Select the priority this task to ensure the appropriate progress of this task.
- g. **Award Manager:** From the dropdown list select the Award Manager.
- h. **External Note:** visible to the subrecipient and cannot exceed 1,000 characters.
- i. **Internal Note:** visible internally to the approver and cannot exceed 1,000 characters.

Award Recommendation Approval Task Creation

Recipient: zDOE **a**

Project: test application STEM 4.9 200 **b**

Subrecipient: **c** Select Subrecipient

Payment Profile: **d** This is auto-populated

Subrecipient Risk: **e** - Select Risk -

Priority: **f** - Select Priority -

Award Manager: **g** mark248 omalley

External Note: **h** Internal

1000 characters remaining.

Internal Note: **i** Internal

j. **EIN:** Enter the Employer Identification Number (EIN) following the standard format.

a. **Example:** 12-1234567

- k. **Award/Contract Number:** If the award/contract is based on a Purchase Order (PO), enter the *Purchase Order (PO) number* in the Award/Contract Number field. *Note:* You will not have the PO # at this stage of the process. See Section 7 – Managing a Subrecipient to add later.

If the award/contract is not Purchase Order (PO)-based, enter the *Allocating Business Unit_Supplier ID* following the standard format, 5-digit Business Unit_10-digit Supplier ID from PeopleSoft Financials (Example: 00700_0000121997) in the Award/Contract number field only.

- l. **PO Number:** This field is open for the agency to use however they see fit.
b. **Project Type:** Utilize the dropdown menu and indicate if the project is a Construction or Non-Construction project



The screenshot shows a form with four fields. The 'EIN' field contains the value '12-1234567' and is marked with a red 'j'. The 'Award/Contract Number' field is empty and marked with a red 'k'. The 'PO Number' field is empty and marked with a red 'l'. The 'Project Type' dropdown menu is set to 'Non-Construction' and is marked with a red 'm'.

- m. **Performance Period Start*:** Utilize the calendar feature to enter the performance period start date.
n. **Performance Period End*:** Utilize the calendar feature to enter the performance period end date.



The screenshot shows two date selection fields. The 'Performance Period Start*' field is empty and marked with a red 'm'. The 'Performance Period End*' field is empty and marked with a red 'n'. Both fields have a calendar icon to their right.

7. Once the Agency eCivis user has completed the first section of the online form, the View/Edit Award Budget will be the next section to complete. You will see that the total budget requested is \$0.00 and it will be up to the agency to fill in the award budget. The Agency eCivis user will click the *Award Budget link* and input the budget allocated for this award.



The screenshot shows the 'View/Edit Award Budget' section. The 'Award Budget' link is highlighted with a red box. Below it, the 'Total Budget Requested' is \$0.00, and the 'Total Match Requested' is \$0.00. A 'Refresh Award Total' link is also visible.

8. Once the budget screen opens, the Agency can input the desired cost in the appropriate budget category(ies).

7. Grant Program/Grant Agreement(s)

					Ext Cost	Direct Cost	
Grant Program/Grant Agreement(s) Totals:					\$100,000.00	\$100,000.00	
Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Item Type
Grant Program/Grant Agreement(s)	Grant Program/Grant Agreement(s)	1.00	\$100,000.00	\$100,000.00	\$100,000.00		Direct Cost

9. Adding a budget narrative at the bottom of the page is optional. Once the budget and optional narrative is complete, the Agency eCivis user will click the *Save Change > button*.

Budget Narrative

Enter your budget narrative below.

10. The Agency eCivis user can close the budget window once the budget is entered. There will now be a Total Budget Requested figure populated in the budget section of this form, however the award total is still defaulted to \$0.

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

Total Budget Requested: \$100,000.00 [Refresh Award Total](#)

Total Match Requested: \$0.00

Allocate Funding:

	Total Funding	Funding Available	Subrecipient Award
US17293 Airport Rescue Grants - FY 2021	\$ 99,000,000.00	\$ 96,860,000.00	\$ 0.00
Award Total			\$ 0.00

11. The Agency eCivis user will allocate money from the available funding source(s) by typing in the amount in the Subrecipient Award box.

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

Total Budget Requested: \$100,000.00 [Refresh Award Total](#)
 Total Match Requested: \$0.00

Allocate Funding:

	Total Funding	Funding Available	Subrecipient Award
US17293 Airport Rescue Grants - FY 2021	\$ 99,000,000.00	\$ 96,760,000.00	\$ 100,000.00
Award Total			\$ 100,000.00

Annotations: "Type in budget requested" points to the Total Budget Requested field. "Must match" points to the Award Total field.

12. Once the Award Total and the Budget Requested Total match, the Agency eCivis user can consider the proposed budget complete and now move forward to the next step.

o) **Frequency (Financial Report):** Define the frequency of the Financial Report task from the dropdown list: *N/A, Monthly, Weekly*.

p) **Frequency (Activity Report):** Define the frequency of the Activity Report task from the dropdown menu: *N/A, Monthly, Weekly*.

q) **Closeout Task Due Date*:** Utilize the calendar feature to enter the due date for the closeout task. Initially this date will auto populate to 90 days after the date entered for "Performance Period End Date". A new date can be entered in the field.

r) **Closeout Task Reminder Date*:** Utilize the calendar feature to enter the due date for the closeout task reminder. Like the Closeout Task Due Date, this field will auto populate to the date entered for "Performance Period End Date". A new date can be entered in the field.

Define an optional frequency for the Financial Report task ⓘ
[Reset to program default](#)
 Frequency:

Define an optional frequency for the Activity Report task ⓘ
[Reset to program default](#)
 Frequency:

Define dates for the closeout task ⓘ
[Reset to program default](#)
 Closeout Task Due Date:*

Closeout Task Reminder date:*

Award Notification File: You have the option to use the notification letter created by eCivis, see below, or choose your own file.

Award Notification Letter

Dear Mark Omalley,

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

Project: Marion County Safety Group

Program: STEM defense

Notification Date:

Approval Date: 06/26/2024

Approved Amount: \$100,000

Other Awards: No non-federal funds were included in this award.

Total Match: \$0.00

Period of Performance: 07/01/2024 - 07/01/2025

Award/Contract Number: 00700_0000161997_00700

Ein: 12-1234567

If you choose to insert your own file, click on the button. Locate your file on your computer and click Open. You will receive a warning message asking you to make sure the Award Notification letter is 2 CFR 200.331 compliant. If it is, click the green Ok button.



s) **Award Files – External:** Attach any relevant files needed by the subrecipient to finalize the award recommendation. These files may include signed agreements, tax forms, financial forms, etc.

t) **Award Files – Internal:** Attach any relevant files related to this subrecipient. NOTE: these files will NOT be seen by the Subrecipient and can only be viewed internally.

Award Notification File



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

File Input



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

Once all required information is provided, click the *Send for Approval > button*. This award will now follow the **Recommendation Approval** workflow defined in the program's solicitation. If the Award Recommendation is missing information or is not ready for approval, click the *Save > button* and edit the award recommendation later.

NOTE: Additional fields may appear when creating the **Award Recommendation** if **Goals** or **Detailed Financial Reporting** were utilized in the **Solicitation**

Step 6: Recommendation Approval

1. On the **Program Detail** page, the newly created recommendation will appear in the **Award Recommendation Approval** section. The current **Approver** will now be assigned this task to complete.

Program Detail
Marine Bridge Unit Published
 Department: Alpha
 Total Funding: \$5,000,000.00
 Application Period: N/A

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

Award Recommendation Approval

Project	Org Name	Award/ Contract Number	Award Approved	Links	Priority	Actions
marine highway project	DOE	00700_0020121997_00700	\$100.00	Award Package Budget		Actions <input type="checkbox"/>

Showing 1 to 1 of 1 entries

[Reload](#) [Approve](#)

2. The approver can now review and verify the information in the award recommendation is correct by opening each of the form links:

a) Award Package – This link is the award recommendation previously created. The Approver should carefully review this information to ensure all data was input correctly. Specifically verifying the **Award Details**, **Internal Note**, **Award Total**, and the **External/Internal Files** are correct.

b) Budget – This link accesses the budget that was entered by the Agency eCivis user and either approved or modified by the subrecipient.

c) Goals – If the solicitation utilized Goals, this link would appear to view goals, subgoals, and target units.

After review, if all information is correct, select the checkbox and click the *Approve > button*.

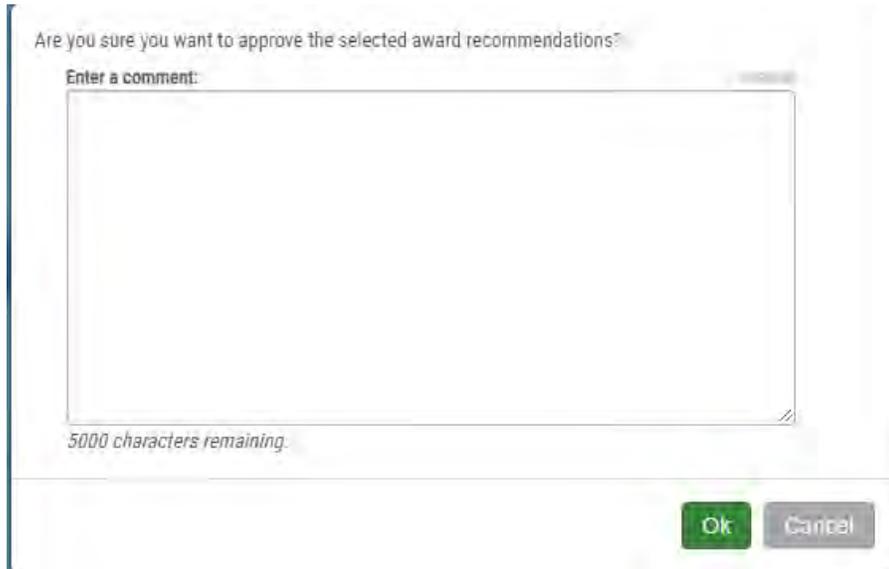
Award Recommendation Approval

Project	Org Name	Award/ Contract Number	Award Approved	Links	Priority	Actions
marine highway project	DOE	00700_0020121997_00700	\$100.00	Award Package Budget		Actions <input type="checkbox"/>

Showing 1 to 1 of 1 entries

[Reload](#) [Approve](#)

3. Enter a comment in the text box and click the *OK > button* to send the award notification to the Subrecipient.



Are you sure you want to approve the selected award recommendations?

Enter a comment:

5000 characters remaining.

Ok Cancel

4. If the information is not correct, the approver can select the appropriate action from the **Actions** column options below if the award is not ready to proceed to the next approval level.

A) **Return for Changes**: Click this option if errors are found in the **Award Package**. Enter a comment clearly stating the reason why the award recommendation is being returned to the Agency eCivis user who created the award recommendation.

B) **Decline Award**: write a comment and send a denial notice to the Subrecipient.

Marion County Safety Group	Marion County Safety Group	00700_0000161997_00700	\$0.00	Award Package Application Budget	Low	Actions <input type="checkbox"/>
						Return For Changes
						Decline Award

Showing 1 to 3 of 3 entries

5. The award package, application, and budget will be sent to the Subrecipient for review. Once the subrecipient reviews the award package, application, and budget, the subrecipient will send the award back to the Agency eCivis user for final approval.

Step 7: Final Award Approval

1. Following the applicant response, the Agency eCivis user will click *Subrecipient Management* from the **Grant Management** tab on the eCivis Grants Network homepage.



2. From the **Program Dashboard** page, the Agency eCivis user will select the appropriate program title.

Program Solicitations 🔍 🔑 Hide Archived Programs

Department	Title	Program Type	Status	Total Funding	Actions
Alpha	STEM defense	N/A	Published	\$1,200,000.00	Actions

3. The Agency eCivis user will scroll down to the **Pending Tasks** section to review any actions taken by applicants.

Pending Awards 🔍 ☐ Include Rejected Awards

Project	Org Name	Award Manager	Award/ Contract Number	Recommendation Status	Current Approver	Actions
Central Unified School District - Title IV	Central Unified School District	A. User	DOE-FY23-00002	Pending Recommendation Approval	Agency eCivis User	Actions
Hull Middle School State of Indiana Title IV (V2)	Hull Middle School	A. User	DOE-FY23-00004	Pending Acceptance	Agency eCivis User	Actions
Northern School District - Title IV	Northern School District	A. User	DOE-FY23-00005	Pending Recommendation Approval	Agency eCivis User	Actions
Southwestern School District Application	Southern School District	A. User	DOE-FY23-00007	Pending Final Approval	Agency eCivis User	Actions

Showing 1 to 4 of 4 entries

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

[Reload](#)

a) If the subrecipient requested changes, their **Recommendation Status** will update to **Subrecipient Changes Requested**. Click **Actions** and *Edit Recommendation* to view the changes requested.

Pending Awards Include Rejected Awards

Project	Org Name	Award Manager	Award/ Contract Number	Recommendation Status	Current Approver	Priority	Actions
Marion County Safety Group	doe	M. OMalley2024	00700_0000121897_00700	Subrecipient Changes Requested	N/A	Low	Actions Edit Recommendation View Award Package View Application View Budget

The **Award Recommendation Approval Task Creation** form will appear with **Changes Requested** noted at the top of the page.

Program Detail

STEM defense Published

Department: Alpha

Total Funding: \$1,200,000.00

Application Period: 06/01/2024 - 06/30/2024

Award Recommendation Approval Task Creation

Changes Requested: Changes requested will be listed here.

Recipient: doe

Project: Marion County Safety Program

Subrecipient: Test

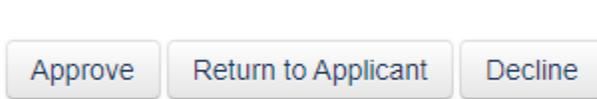
b) If the applicant accepts their award, the agency user can scroll down to the Pending Task row where the **Recommendation Status** will update to **Final Award Approval**. This triggers the final approval workflow and creates a **Pending Task** for the **Final Award** approver. From the **Actions** column click *Review*. If there is a standard approval group, only one individual needs to perform this action. If there is a sequential group, follow these steps for each individual in the group.

Pending Tasks

Project	Org Name	Award/ Contract Number	Task Type	Reporting Period	Award Type	Invoice Number	Current Status	Submitted Date	Priority	Actions
Marion County Safety Group	Marion County Safety Group	00700_0000161997_00700	Final Award Approval		N/A		Final Award Approval	06/26/2024	Low	Actions Review

4. The **Award** Details page will appear allowing the approver to review the award details, notes from the applicant, budget, and award files to verify all information is accurate and complete. Once the award is reviewed, one of the following actions may be taken by clicking one of three buttons at the bottom of the page:

- **Approve:** If the award package is accurate and complete, click Approve and this task will be sent to the next approver in the workflow, if applicable. Once the final approver clicks Approve the award will be finalized and the applicant will be notified.
- **Return to Applicant:** If any changes need to be made to the award package, taking this action will notify the subrecipient to log-in to the eCivis Subrecipient Portal and make the requested changes.
- **Decline:** If the Indiana State Agency wishes to no longer award this applicant, select Decline to notify the applicant of the final decision.



5. Once the **Final Award Approval** is completed, the award will now appear in the **Subrecipient Awards** section at the bottom of the **Program Detail** page.

Subrecipient Awards

Project	Organization	Award Manager	Award/ Contract Number	Award Type	Status	Contract Start	Contract End	Total Award
Marion County Safety Group	Marion County Safety Group	M. O'Malley2024	00700_0000161997_00700	N/A	Awarded	07/01/2024	07/01/2025	\$95,000

Conclusion

After the award has gone through the Direct Awarded Process, the Agency eCivis user can manage those subrecipients awards through the *SOI User Guide - Grantor 6. Managing Subrecipient Tasks and Reports*.

Definitions

Agency eCivis user – A user of eCivis Grants Network. This is a State of Indiana staff person using the system as a Grantee or Grantor. See Grantee and Grantor.

Applicant – An individual or entity applying to a grant program.

Application – The specific set of forms, documents, and attachments that comprise an Applicant's submission to a solicitation. See Solicitation.

Application Workspace – An Application Workspace is created for authorized Agency eCivis users to view and create their application and evaluation forms outside of any State of Indiana required fields for competitive solicitations. It will also include the budget selected at solicitation, but it is not editable. The Application Workspace allows Agency eCivis users to identify application review team members, make application review assignments, and tabulate review results and scores. See also Solicitation and Zengine.

Approval Groups – Groups of State of Indiana employees responsible for approving tasks e.g., State Budget Agency (SBA) pursuant approval or financial reports with/without payment/reimbursement requests from Subrecipients. Approval groups may be set up so that any one person in the group can approve the task (Standard) or that all members of the group must approve the task in a specific sequence (Sequential).

Assistance Listing – Formerly known as the Catalog of Federal Domestic Assistance (CFDA), it refers to the publicly available listing of Federal assistance programs managed and administered by the General Services Administration (GSA).

Assistance Listing Number (ALN) – A unique number assigned to identify a Federal Assistance Listing, formerly known as the CFDA number. See Assistance Listing.

Budget – The financial information Applicants are required to submit to the Funder or Grantor detailing how they will spend grant funds, if awarded. This budget is carried over to the awarded grant so that the Grantee or Subrecipient reports financial information at the level of detail required by each grant program.

Cash Match – A portion of project costs not paid by Federal funds as a direct project expense ([2 CFR 200.306](#)). This portion of the project costs are provided as cash from the Indiana State Agency or State of Indiana resources.

Catalog of Federal Domestic Assistance (CFDA) Number – Now known as the Assistance Listing or Assistance Listing Number (ALN), it refers to the publicly available listing of Federal assistance programs managed and administered by the General Services Administration (GSA). eCivis will be updating the system to remove CFDA.

Configuration – The process of connecting the grant solicitation to the Application Workspace as a Grantor for competitive solicitations. This occurs when the Agency

eCivis user clicks *Create App Workspace*. This requires eCivis technical support to assist with finalizing the process.

Department – Departments built within eCivis Grants Network. A single Indiana State Agency may have one or more departments within eCivis Grants Network representing their divisions, offices, agencies, etc.

Department Master Account Holder (DMAH) – An Agency eCivis user that can see across their entire eCivis Grants Network listing or department, typically an Indiana State Agency Lead. Please see the [State of Indiana eCivis Policy: User Management](#) for more information.

eCivis – The software vendor that created eCivis Grants Network (Indiana State Agencies as Grantees/Grantors) and eCivis Grants Portal (Applicants/Subrecipients to Indiana State Agencies' grant programs).

eCivis Project – Project is used in two ways within eCivis Grants Network, Grantee project and Grantor project. See Grantee Project and Grantor Project.

Evaluator – The person responsible for reviewing and evaluating a grant application. An Evaluator may be a State of Indiana employee or an external party (non-State of Indiana employee). Reviewers do not need to have an eCivis Grants Network license/account. Also referred to as a Reviewer or Peer Reviewer.

Federal Award Identification Number (FAIN) – The unique identifier within the Federal agency for each financial assistance award.

Federal Fiscal Year (FFY) – The 12-month period the Federal government uses for financial or budgetary reporting. The FFY begins on October 1st and ends on September 30th. For example, FFY 2023 begins October 1, 2022, and ends September 30, 2023.

Financial Report (Payment or Reimbursement Request) – The task assigned to a Grantee or Subrecipient to submit financial data. Financial reports can also include payment or reimbursement requests within them. These reports are usually recurring in nature through the grant term.

Funder – See Grantor.

Goals – The outcomes to be achieved as a byproduct of the projects or programs administered by an Indiana State Agency. Goals can be captured and tracked in eCivis Grants Network, depending on the requirements of each grant program.

Grant Amendment – An amendment (either initiated by the Grantor or Grantee/Subrecipient) that will officially change the terms of the agreement. An amendment can edit the scope of work, grant term, or financial information.

Grant Program – See Program.

Grant Tags – Also referred to as Organization Tags. They are a tool used in eCivis Grants Network to help further identify and organize projects and grants.

Grant Term – See Period of Performance.

Grantee – Persons or organizations who receive funding from another party. Indiana State Agencies operate in the role of a Grantee when they receive funding from external parties like the Federal government. A Grantee is also referred to as a Subrecipient.

Grantee Project – Indiana State Agencies can manage grants that they pursue from pre-award to post-award by creating a project.

Grantor – Persons or organizations that provide grant funding to another party. Indiana State Agencies operate as Grantors when they distribute grant funds to Subrecipients (Grantees). Also, referred to as a Funder.

Grantor Project – A project title is required for each application submitted by an Applicant and an award granted by an Indiana State Agency. The Subrecipient or the Grantor (Indiana State Agency) can edit the project title at any time. The project title is called Project or Project Name in eCivis Grants Network.

Grants Network (GN) – The eCivis name for the software. eCivis also refers to the system as “eCivis,” “eCivis Grants Network,” or “GN.”

Indiana State Agency Lead – A State of Indiana employee in a leadership role within eCivis Grants Network. See Department Master Account Holder (DMAH).

In-Kind Match (Third-Party In-Kind Contribution) – The value of a non-cash contribution (i.e., property or services) that—(1) benefit a Federally-assisted project or program; and (2) are contributed by non-Federal third parties, without charge, to a non-Federal entity under a Federal award ([2 CFR 200.1](#)).

Notice of Funding Opportunity (NOFO) – A formal announcement of the availability of funding through a financial assistance program from an awarding agency.

Organization Funding – Funding opportunities that do not appear in the eCivis Grants Network Search for Grants feature will need to be entered manually as Organization Funding.

Pass-Through Funding – Refers to funding given to a non-Federal entity that provides a subaward to a Subrecipient to conduct part of a Federal program.

Period of Performance (Performance Period) – Time interval between the start of an award and the end date. Referred to also as the Grant Term and Project Period.

Portal (eCivis Grants Portal) – The public-facing portal for Applicants of all Indiana State Agency grant programs released in eCivis Grants Network. URL: <https://portal.ecivis.com/#/login>.

Post-Award – Post-award can be utilized in two aspects of the grant lifecycle, Post-Award Grantee and Post-Award Grantor. See their definitions for more specifics.

Post-Award Grantee – A stage in the lifecycle of a grant after the Indiana State Agency has accepted the award. Components of the post-award process include

financial reporting, activity reporting, Subrecipient management, and closeout. See Pre-Award and Pre-Award Grantee definitions too.

Post-Award Grantor – A stage in the lifecycle of a grant after the award has been made to a Subrecipient. Components of the post-award process include status reporting, financial reporting/payment request, payment processing, and closeout. See Pre-Award and Pre-Award Grantor definitions too.

Pre-Award – Pre-award can be utilized in two aspects of the grant lifecycle, Pre-Award Grantee and Pre-Award Grantor. See their definitions for more specifics.

Pre-Award Grantee – A stage in the lifecycle of a grant that precedes the awarding of the grant. Components of the pre-award process include application, application review and evaluation, and application submission to the Grantor (Federal, foundation, etc.).

Pre-Award Grantor – A stage in the lifecycle of a grant that precedes the awarding of a grant. Components of the pre-award process include solicitation setup, application creation, application launch, submitted application review and evaluation, award approval, and award finalization. See Post-Award and Post-Award Grantor.

Program – The release of funds to Subrecipients. Programs are also referred to as “grant programs.” For example, The Office of Community and Rural Affairs releases a grant program to accept applications for the Community Development Block Grant (CDBG) application.

Program Income – Gross income earned by a non-Federal entity that is directly generated by a supported activity or earned because of the Federal award during the period of performance.

Program Manager – An Agency eCivis user that is the first Agency eCivis user to set up a Grantee project or solicitation (Grantor).

Project – See Grantee Project.

Project Lead – The grant program manager or other departmental authority for a specific Grantee project in eCivis Grants Network. Also, Project Lead is referred to sometimes as simply the Lead.

Reviewer – See Evaluator.

Solicitation – The public-facing notification of available grant funding. The solicitation setup in eCivis Grants Network creates either public-facing or internal content, dependent upon program-specific settings. See Notice of Funding Opportunity (NOFO).

State Fiscal Year (SFY) – The 12-month period the State of Indiana uses for financial or budgetary reporting. The SFY begins on July 1st and ends on June 30th.

Subrecipient – An entity that receives a grant from an Indiana State Agency utilizing eCivis Grants Network. Also, it can be referred to as a Grantee of the Indiana State Agency.

Task – A system-generated “to do” that must be completed. Tasks can be manually created, or system-generated as part of a workflow. See Workflow.

Workflow – A series of review and approval activities or tasks that must be completed to accomplish specific parts of the grant process, e.g., State Budget Agency (SBA) pursuance approval or financial reports with/without payment/reimbursement requests from Subrecipients.

Workspace – See Application Workspace and Zengine.

Zengine – The third-party tool used for the configuration of online applications, application review forms, assignment of reviewers to applications, and online review and scoring of submitted grant applications. This is also referred to as the Application Workspace.