

Objective: Agencies understand how to send their eCivis Project to SBA for approval via a “Task”.

When in the “App. Preparation” Grant Status, two tasks are automatically created: SBA approval requests that begin with the agency’s Budget Analyst, & is then sent to the Director of Federal Grants Policy and Management.

Request approval -> assigned to team lead -> Done -> Save -> Approval Requested

SBA Budget Analyst* reviews Project to determine if the agency is ready to apply for the award on the external site.

*Tasks are assigned to SBA Analyst groups so that more than one can access if/ when someone is out.

- How much the agency’s requesting, whether a State Match is required, & any additional documentation.
- Can look at project tabs to view more information, or click the grant name’s link for expanded information.
- Tasks allow you to talk back and forth: Budget Analysts can send questions right back to the agency.

Grant Lifecycle: when the project was in “Under Consideration” & when it was sent to SBA for approvals.
Ready for it to go to SBA? Can change who is in charge of this
Due Date is auto-populated; can add reminders, too.

Grant Status: Know you want to go for it? “Application Preparation” is the next stage.
Completed Project creation is essentially a FARF/ Request Form.

Says request approval is the task? Not with SBA yet -> Done -> save.

- changed from request approval change to Approval requested and it is assigned to SBA.
- Do the same thing for Director of Federal Grants Policy and Management for final approval.

SBA Analyst can send back to ask for more information. They can be specific. We can add documents and say, “hey, here’s the document we really need, can you supply that?” All of that will be here so you can see completed tasks.

Approval History: know when you’ve received approval for something and you can reference those timestamps.

When you’re ready to submit your application, you’ll click that dial; State statute requires us to track & publish all applications, but haven’t had a good way of keeping, obtaining, & then publishing applications.

eCivis will serve as a record of applications. (Which is great for agencies as well; “what did we submit last time?”)

If someone leaves who submitted the FARF, previously, you don’t have it, but now will have a reference.

“I will not apply” doesn’t eliminate the project: closes it & allows you to change your mind/ view existing documentation.