



State of Indiana eCivis Grants Network Pre-Award User Guide

Grant Search to Application Submission August 2024

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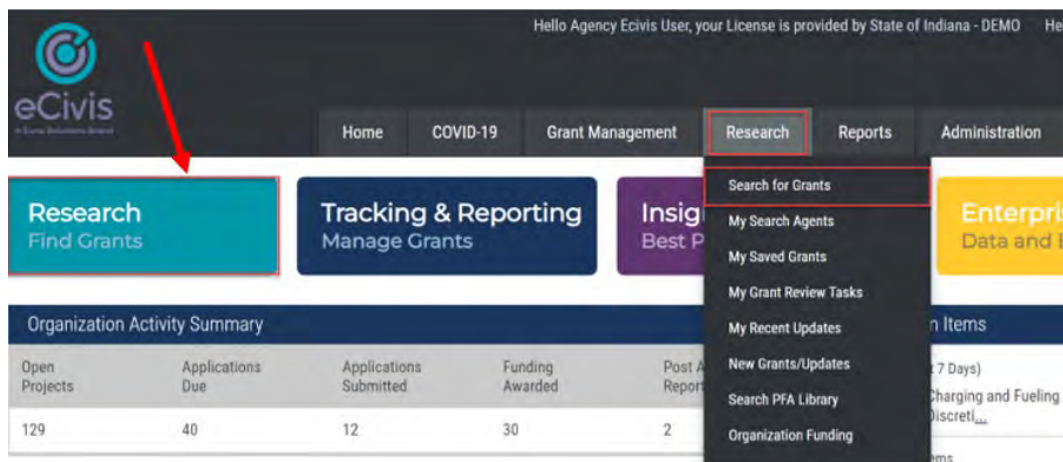
Purpose

The purpose of this user guide is to provide specific instructions to Indiana State Agencies to follow when researching, pursuing, and managing their submitted grant applications. These steps will allow Agency eCivis users to search for grants, create a project, save/assign funding opportunities, and manage their grant prior to being awarded.

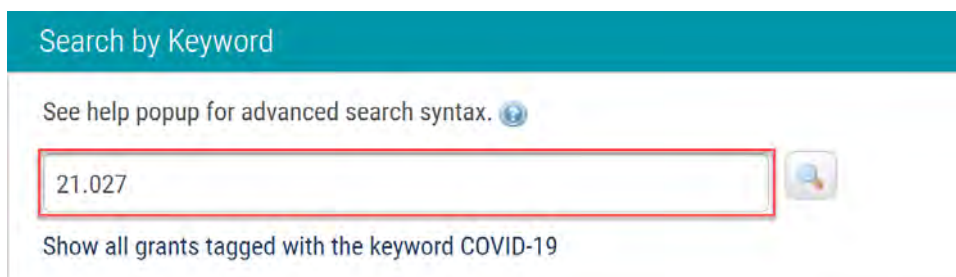
Step 1: Searching for a Grant


NOTE: If the Agency eCivis user is entering Year 2 or more of a multi-year grant, see [Appendix A – Multi-Year/Multi-Budget Grants](#). All others, follow the below process.

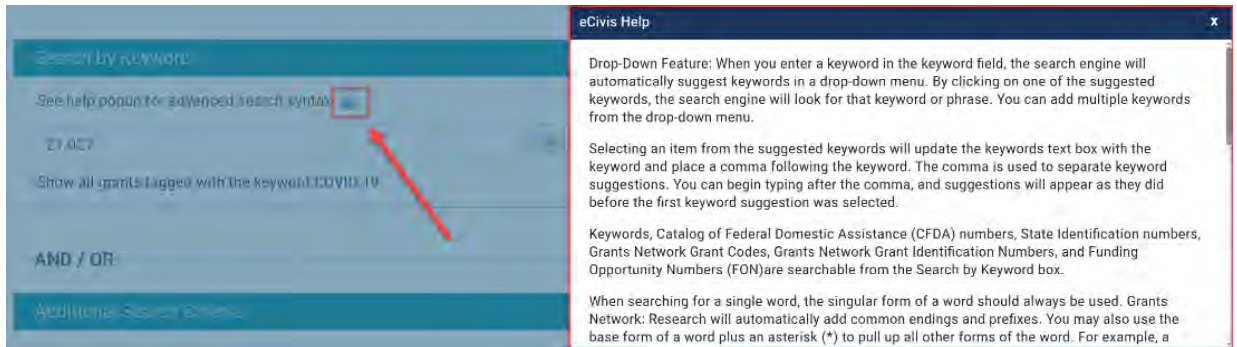
- 1) On the eCivis Homepage, the Agency eCivis user will select either the light blue *Research/Find Grants* button, or the *Search for Grants* from the **Research** tab at the top of the page.



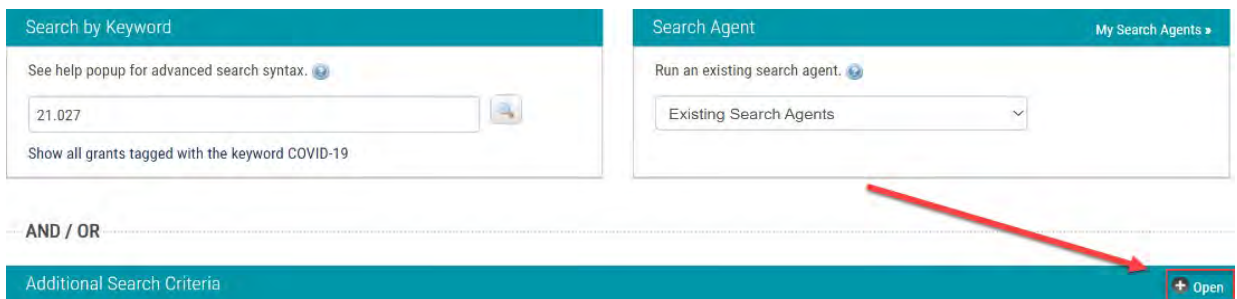
- 2) In the **Search by Keyword** box, enter any keywords such as the grant name, Assistance Listing Number (formerly Catalog of Federal Domestic Assistance [CFDA]), or any other keywords that will assist in identifying a specific grant or grants for an Agency's purpose.



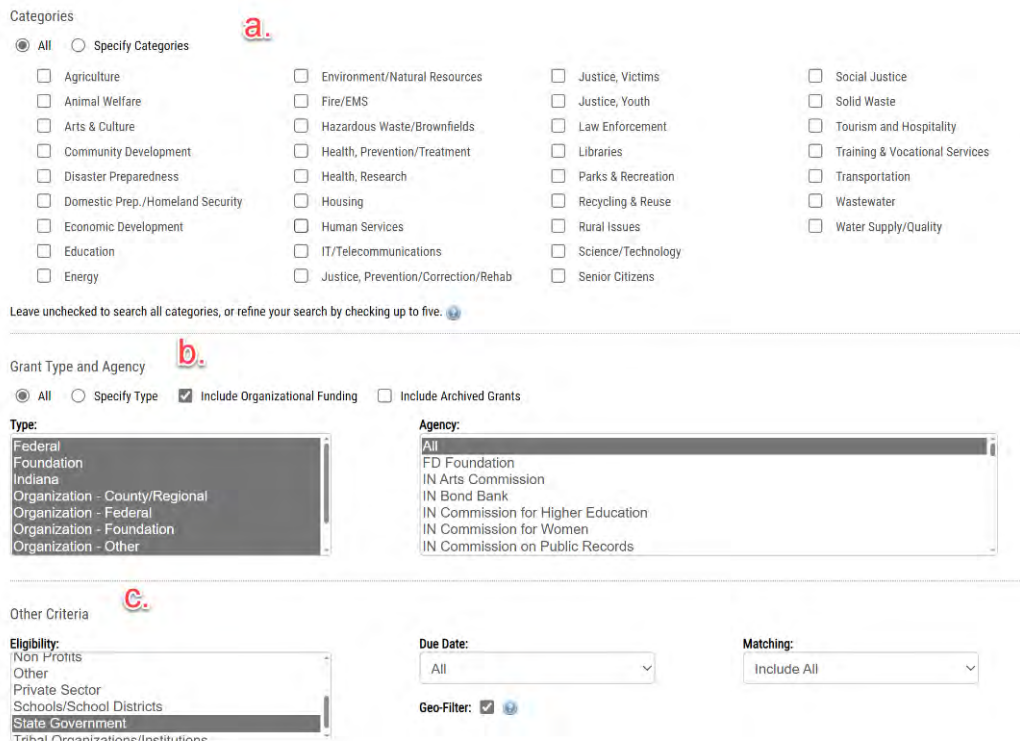
NOTE: Advanced search syntax may be utilized in this feature to improve results. For additional information click the *eCivis Help Icon* .



3) Once the keyword(s) is entered on the **Additional Search Criteria** bar click the **+Open button** **Open** to specify other search criteria.




4) The following search criteria will appear:



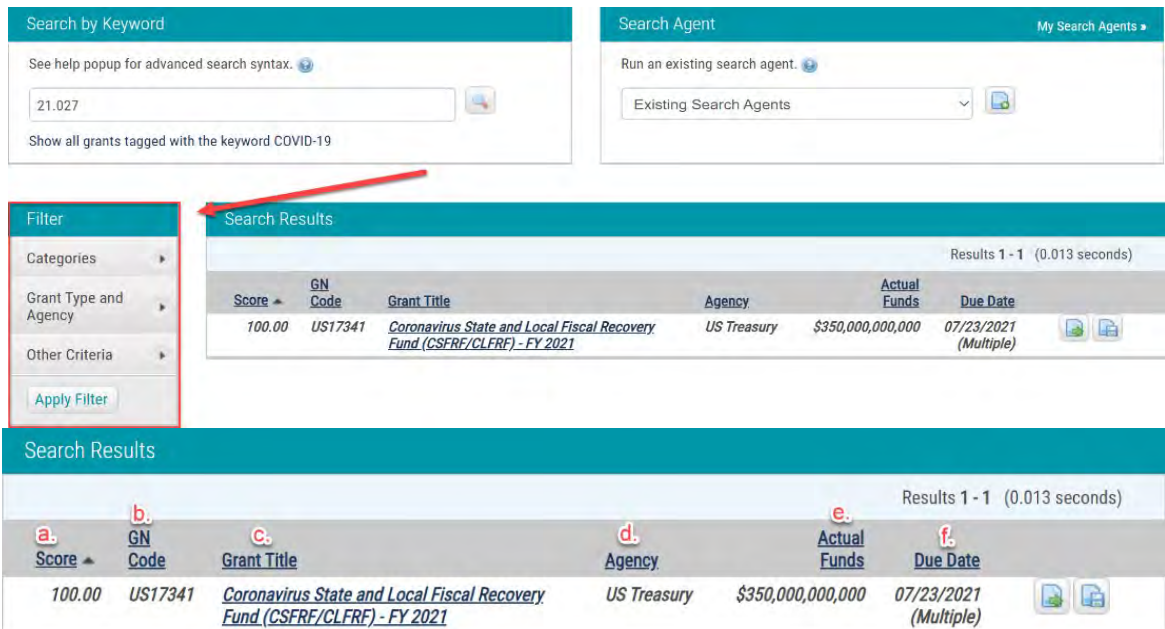
- a. **Categories:** All grants are assigned at least one category within Grants Network.
- For additional information click the **eCivis Help Icon** below the category list.

- b. **Grant Type and Agency:** In this section, Grant Type and Agency menus will appear along with the option to include organization funding. These options will allow the Agency eCivis user to filter the search results by selecting single or multiple options from each menu.
- **Include Organizational Funding:** Selecting this *checkbox* populates existing organization funding entries (Grants manually entered that would otherwise not appear in the eCivis Grants Network). This ensures agencies do not recreate existing Organization Funding. See [Appendix F](#) for more information on Organization Funding.
- c. **Other Criteria:**
- **Eligibility:** From this menu, the Agency eCivis user will specify one or more eligible applicant type(s) for which they are conducting research.
 - It is recommended to only select *State Government*.
 - **Due Date:** This section is a dropdown menu for application due date options.
 - **Matching:** This dropdown menu has various options (*Include All, Yes, No, and Recommended*) for match or cost share of a grant.

BEST PRACTICE: In the Matching dropdown menu, the Agency eCivis user should select *Include All* as the match or cost share may be minimal, addressed through non-cash/in-kind/third-party, etc.
 - **Geo-Filter:** The **Geo-Filter** option filters federal or foundation grants so that only grants applicable to your state will appear in the search results. The **Geo-Filter** option is checked by default. Un-checking the **Geo-Filter** option will display all federal or foundation grants in the search results, regardless of their geographic association.

Once the search criteria are specified click the *Find Grants Now!* > button .

5) The **Search Results** page will appear for review. These results can be filtered further using the *Filter* options but can be adjusted to the left of the results and/or sorted using the headers in the *Search Results* table.



The screenshot displays the search interface. At the top, there are two search input fields: "Search by Keyword" with the value "21.027" and "Search Agent" with a dropdown menu. Below these is a "Filter" sidebar with options for "Categories", "Grant Type and Agency", and "Other Criteria", along with an "Apply Filter" button. The main area shows "Search Results" with a table of results. A red arrow points to the "Filter" sidebar.

Score	GN Code	Grant Title	Agency	Actual Funds	Due Date
100.00	US17341	Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021	US Treasury	\$350,000,000,000	07/23/2021 (Multiple)

The second screenshot shows the same results table with letters a-f highlighting specific columns: a. Score, b. GN Code, c. Grant Title, d. Agency, e. Actual Funds, and f. Due Date.

Search Results						
Results 1 - 1 (0.013 seconds)						
a. Score	b. GN Code	c. Grant Title	d. Agency	e. Actual Funds	f. Due Date	
100.00	US17341	Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021	US Treasury	\$350,000,000,000	07/23/2021 (Multiple)	 

- a. **Score:** A relevancy score is given to the grant based on how well it matches the search criteria. (A higher score means it more closely matches the search criteria.)
- b. **GN Code:** A GN Code or Grants Network Code is a unique identifying code assigned by eCivis to each grant in their database. Prefixes are used in the GN Code to differentiate the following types of funders:
 - **US:** Federal Grant
 - **FD:** Foundation
 - **IN:** State Grant (abbreviation for State of Indiana)
- c. **Grant Title:** Title of the grant.
- d. **Agency:** Identifies the funder.
- e. **Actual Funds:** The total funds available for the entire grant program.
 - If **Unspecified:** The grant program has not specified total funds available. However, an Agency eCivis user can click the *Grant Title* link for more information specifically in the *Financial* tab as it provides further details related to the funding for the grant.
- f. **Due Date:** The due date for the grant application may appear as an actual date or may be listed as **Rolling** or **Multiple**.
 - **Rolling:** The grant program accepts applications on a rolling basis (throughout the year).
 - **Multiple:** The grant program has multiple funding cycles throughout the year when it accepts applications.

An Agency eCivis user can view a snapshot of the grant by hovering the mouse over the title of the grant. In this example, the Grant title is Coronavirus State and Local Fiscal Recovery Fund. However, to review detailed information on any grant, the Agency eCivis user should click the title of the grant to see the **Grant Details** page. To save the search criteria for ongoing funding research, the Agency eCivis user may use [Appendix B – Grant Search Agents](#) for help in creating a tool to perform this action.

IMPORTANT: Some grants do not exist in eCivis Grants Network as they are not publicized due to their limited eligibility, like certain formulaic grants. If an Agency eCivis user searches for a particular grant and does not find it using the steps above, they will need to enter the grant manually into eCivis Grants Network using Organization Funding (see [Appendix F – Organization Funding](#) for more information).

- 6) The **Grant Details** page will contain additional information on this funding opportunity. This page will enable an Agency eCivis user to identify grant programs in eCivis Grants Network that fit the Indiana State Agency’s programmatic and financial mandates, priorities, and needs. The following tabs may appear and will vary based on the level of detail provided and entered by the grantor in eCivis Grants Network.

- a. **Summary:** Provides basic information about the grant program including the intent and purpose of the funding and the types of projects that may be funded.

US17341 Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021

Save / Assign Email Grant Grant Usage

Summary Eligibility/Application Financial Contact/Files Updates

Type: Federal Next Due: 07/23/2021 (Multiple)*
 Agency: U.S. Department of the Treasury Solicitation Date: 05/10/2021
 CFDA/ALN: 21.027
 Office: U.S. Department of the Treasury Match Required: No
 Multipart Grant: No Actual Funds: \$350,000,000,000 (Confirmed)

Summary:

The purpose of this program is to respond to the coronavirus emergency and bring back jobs. Funding will be provided for a substantial infusion of resources to help turn the tide on the pandemic, address its economic fallout, and lay the foundation for a strong and equitable recovery. Eligible activities include those that:

- Support urgent COVID-19 response efforts to continue to decrease spread of the virus and bring the pandemic under control
- Replace lost revenue for eligible state, local, territorial, and tribal governments to strengthen support for vital public services and help retain jobs
- Support immediate economic stabilization for households and businesses
- Address systemic public health and economic challenges that have contributed to the unequal impact of the pandemic, including on tribal communities

- b. **Eligibility/Application:** Provides further information on eligible applicants, details on the application submission process, application information needed, and the application evaluation criteria.

US17341 Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021

Save / Assign Email Grant Grant Usage

Summary Eligibility/Application Financial Contact/Files Updates

Eligibility Notes: Eligible Applicants:
 Eligible applicants are: Local Government
 • State governments Native American Tribe
 • Local governments, including: State Government

- c. **Financial:** Provides basic financial information along with additional details on grant cost share or match requirements and eligible uses of funding.

US17341 Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021

Save / Assign Email Grant Grant Usage

Summary Eligibility/Application Financial Contact/Files Updates

Match Required: No
 Actual Funds: \$350,000,000,000 (Confirmed)

Match Notes:
 There are no stated matching requirements for this program.

- d. **Contact/Files:** Provides the grant contact information, agency information, and any additional files or notes included in the grant solicitation, including the Notice of Funding Opportunity (NOFO).

US17341 Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021

Save / Assign Email Grant Grant Usage

Summary Eligibility/Application Financial **Contact/Files** Updates

Contact:
Program Staff
SLFRP@treasury.gov

Contact Notes:
Questions should be directed to the program staff.
Applications must be submitted online at adfs.treasury.gov/adfs.

- e. **Updates:** This tab is only visible if the grant has been updated with new information. This information will be dated and note the changes made. These updates may include information on new webinars, updated grant guidance, awards, or other items.

US17341 Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021

Save / Assign Email Grant Grant Usage

Summary Eligibility/Application Financial Contact/Files **Updates**

June 01, 2021: Information regarding the changing of the due date for tribal applicants has been released and attached as the TribalDueDateExt file. An updated list of answers to frequently asked questions regarding this program has been released and attached as the FAQ file. The Application section has been updated accordingly.

May 27, 2021: Information regarding the changing of the due date for tribal applicants and updated information regarding non-entitlement units has been released and included in the attached revised NOFA file. The Financial and Application sections have been updated accordingly.

May 18, 2021: A revised interim final rule document for this program has been released and attached as the InterimFinalRule file.

- f. **PFA (Previously Funded Applications):** This tab is only visible if the grant has Previously Funded Applications (PFAs) in the eCivis Grants Network. The Coronavirus Relief grant, in the earlier example, does not have a previously funded application (PFA). The example below is for a water assistance grant. If provided, these files can be practical examples of the types of awardees and applications funded along with being a helpful resource in preparing an application.

US0483 Emergency Community Water Assistance Grants (ECWAG) - FY 2023

Save / Assign Email Grant Grant Usage

Summary Eligibility/Application Financial Contact/Files **PFAs**

Project: [2014 Water Supply Restoration Project](#) (Click to view PFA, file size: 767.0 Kb)



Applicant: Alpaugh Community Services District

Summary: The purpose of this program is to assist rural communities that have experienced a significant decline in quantity or quality of drinking water due to an emergency, or in which such decline is considered imminent. The Alpaugh Community Services District requested and received \$250,000 to fund the 2014 Water Supply Restoration Project, which aims to lower an existing well and install a larger pump to provide water to the community.

If the Indiana State Agency is interested in this grant and wants to place it under consideration, proceed to [Step 2: Save/Assign a Grant to a New Project](#).

Step 2: Save/Assign a Grant to a New Project

NOTE: If the Agency eCivis user is entering Year 2 or more of a multi-year grant, see [Appendix A – Multi-Year/Multi-Budget Grants](#). All others, follow the below process.

- 1) An Indiana State Agency can save a grant for consideration using the *Save/Assign Grant icon*  on the **Search Results** page or from the **Grant Details** page by clicking the *Save/Assign button*  .

From the Search Results page:



Score	GN Code	Grant Title	Agency	Actual Funds	Due Date	
100.00	US17341	Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021	US Treasury	\$350,000,000,000	07/23/2021 (Multiple)	

From the Grants Details page:

US17341 Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021

Summary	Eligibility/Application	Financial	Contact/Files	Updates
Type:	Federal	Next Due:	07/23/2021 (Multiple)*	
Agency:	U.S. Department of the Treasury	Solicitation Date:	05/10/2021	
CFDA/ALN:	21.027			
Office:	U.S. Department of the Treasury	Match Required:	No	
Multipart Grant:	No	Actual Funds:	\$350,000,000,000 (Confirmed)	

- 2) The **Save/Assign** pop-up window will appear with a list of options. The State of Indiana has implemented a one grant to one eCivis Project policy. Therefore, the Agency eCivis user must always select, *Assign grant to a new project*.



Save/Assign Grant

Grant: US17341 Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021

Assign grant to an existing project

Assign grant to a new project

Save as unassigned

Cancel >

- 3) In **Step 1. Select Department & Project** choose the *Department* from the dropdown menu. Fields that are bolded and/or have a red asterisk are required by eCivis.

Assign Grant to New Project

1. Select Department & Project

Grant: US17341 Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021

Department *:

Project *:

- 4) The **Project*** field has a specific naming convention requirement. The **Project*** field should be the same as the **Grant** field minus the **GN Code**.

IMPORTANT: The Agency eCivis user will enter the same name as the **Grant** (minus the prefix eCivis identifier or **GN Code**, e.g., US17341 has been removed from the **Project*** below by simply copying and pasting the **Grant** field without the leading **GN Code** into the **Project*** field.

Assign Grant to New Project

1. Select Department & Project

Grant: Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021

Department *:

Project *:

**GN Code - Do Not Include
in Project Title**

- 5) Select the **Project Lead*** from the drop-down menu. The **Project Lead** is the Agency eCivis user responsible for the pre-award process (seeking State Budget Agency [SBA] approval). The dropdown menu *Select Project Lead* options are linked to the Department selected. Only those Agency eCivis users attached to the selected Department will appear in the **Select Project Lead** dropdown menu.
- a. If the Agency eCivis user performing this action chooses a different Agency eCivis user from that dropdown menu (i.e., not themselves), they will appear as a member of the **Project Team** once they click the *Save > button* after completing this section.
 - b. The **Project Lead** can be changed after the project is created. Additionally, other team members can be added, assigned tasks, etc.

Assign Grant to New Project

1. Select Department & Project

Grant: US17341 Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021

Department *:

Project *:

Project Lead *:

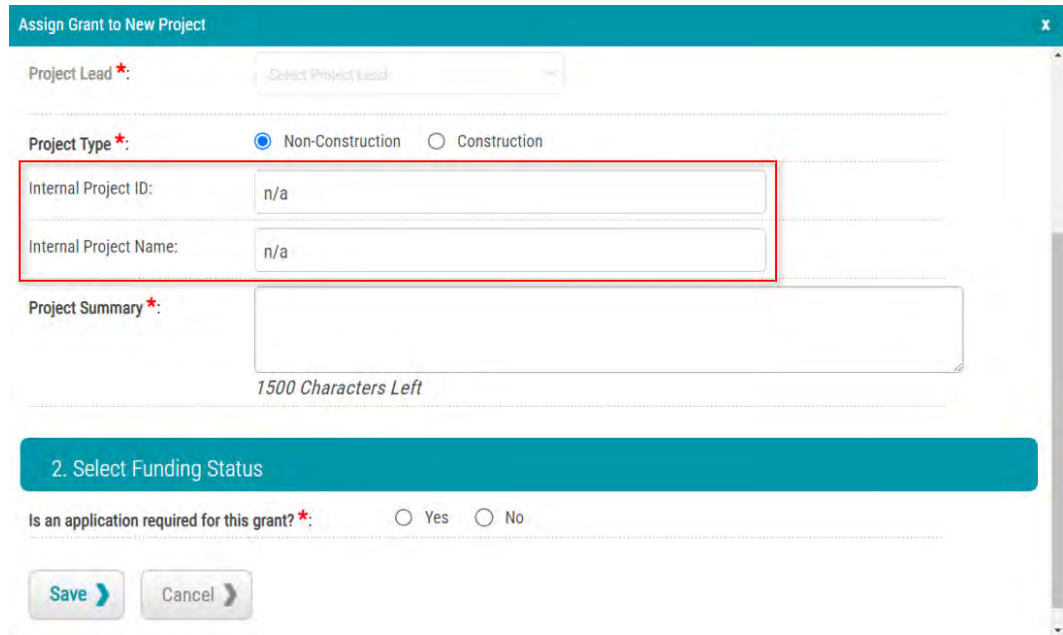
- 6) The **Project Type*** defaults to *Non-Construction*. If the project is construction click the *Construction radio button* to change it.



The screenshot shows a form titled "Assign Grant to New Project". The "Project Lead*" field is a dropdown menu with "Select Project Lead" as the placeholder. The "Project Type*" field has two radio buttons: "Non-Construction" (which is selected) and "Construction". A red box highlights the "Project Type*" field.

The **Internal Project ID** and **Internal Project Name** fields serve an important role.
The Agency eCivis user will add **n/a** to both of these fields.

NOTE: it is imperative that only three characters, in the following exact configuration & case be used: **n/a**



The screenshot shows the "Assign Grant to New Project" form. The "Project Lead*" field is a dropdown menu with "Select Project Lead" as the placeholder. The "Project Type*" field has two radio buttons: "Non-Construction" (which is selected) and "Construction". The "Internal Project ID:" field and the "Internal Project Name:" field both contain the text "n/a". A red box highlights these two fields. Below these fields is the "Project Summary*" field, which is empty. At the bottom of the form, there is a section titled "2. Select Funding Status" with a question "Is an application required for this grant?*" and two radio buttons: "Yes" and "No". At the bottom of the form, there are "Save" and "Cancel" buttons.

- 7) The Agency eCivis user will need to enter the program and project synopsis in the **Project Summary***.
- This field is limited to 1,500 characters.



The screenshot shows the "Project Summary*" field, which is empty. Below the field, it says "1500 Characters Left".

- 8) In the second section, **2. Select Funding Status**, the Agency eCivis user will need to answer **Is an application required for this grant?**

IMPORTANT: The Agency eCivis user will always click Yes.

All grants and projects will have an application (unless otherwise specified by SBA). An “application” means any form, report, or other type of communication submitted to a funder to receive assistance.

- 9) In the third section, **3. Select Grant Status**, the Agency eCivis user must select Under Consideration for all grants and projects.

The image shows two sections of a web form. The first section, titled '2. Select Funding Status', contains the question 'Is an application required for this grant? *' with radio buttons for 'Yes' (selected) and 'No'. The second section, titled '3. Select Grant Status', contains a dropdown menu for 'Grant Status *' with options: 'Select Grant Status', 'Under Consideration', 'Application Preparation', and 'Application Submitted'. Below the dropdown are 'Save' and 'Cancel' buttons.

- 10) This selection will prompt another section, **4. Complete Status Form**, to appear. The **Internal Grant ID** and **Internal Grant Name** fields are reserved by SBA.

The image shows the '4. Complete Status Form' section. It contains two input fields: 'Internal Grant ID:' and 'Internal Grant Name:'. Below these fields are two columns of tags: 'All Organization Tags' and 'Selected Organization Tags'. The 'Grant Tags*' label is positioned to the left of the tag columns.

- 11) **Grant Tags*** are a required field. If the Agency eCivis user’s grant requires one or more of tags 2-7, the Agency eCivis user must move the tag(s) from *All Organization Tags* to *Selected Organization Tags*. If none of the tags apply, move the **1 - Not Applicable** tag to the right under Selected Organization Tags.

- a. 1 - Not Applicable
- b. 2 - Maintenance of Effort – *UPLOAD FORM*
- c. 3 - Third Party *Match* – *UPLOAD FORM*
- d. 4 - MOU Substate Transfer – *UPLOAD FORM* or MOU
- e. 5 - Staff Needed – New Contractor – *UPLOAD FORM*
- f. 6 - Staff *Needed* – New *FTE* – *UPLOAD FORM*
- g. 7 - State Match Included
- h. 8 – New Grant
- i. 9 – Private Grant or Donation
- j. *Activity* – eCivis-generated Grant Tag, **do not use.**
- k. *Financial* – eCivis-generated Grant Tag, **do not use.**
- l. *Monitoring* – eCivis-generated Grant Tag, **do not use.**

Again, do not select Activity, Financial, or Monitoring.

NOTE: for the 8 – New Grant tag:

Federal assistance should be considered **new** if a state agency did not previously receive and execute an active award/agreement (and corresponding federal funding source) pertaining to the exact same program at any point in the calendar year prior to the start date of the current or forthcoming assistance.

Under this definition, each of the following would be examples of a “new” grant/federal assistance:


- Federal assistance the State has never received before.
- Federal assistance that an agency has never received before, even if another agency within the State has previously received it.
- Federal assistance that an agency has previously applied for, but never received.
- Federal assistance that an agency has previously received but is not currently active.
- Federal assistance that is programmatically the same but has a budget or project period that overlaps an active program.
- Federal assistance that changes title names at the conclusion of a multi-year project period.
- Federal assistance for which the assistance listing number (ALN) changes from one year to the next, even if the title remains the same.

Grant Tags*:

All Organization Tags	Selected Organization Tags
2 - Maintenance of Effort - UPLOAD FORM	1 - Not Applicable
3 - Third Party Match - UPLOAD FORM	
4 - MOU Substate Transfer - UPLOAD FORM	
5 - Staff Needed - New Contractor - UPLOAD	
6 - Staff Needed - New FTE - UPLOAD FORM	
7 - State Match Included	
8 - New Grant	
9 - Private Grant or Donation	

12) **Notes** are not required at the **Under Consideration Status** or **Stage**.

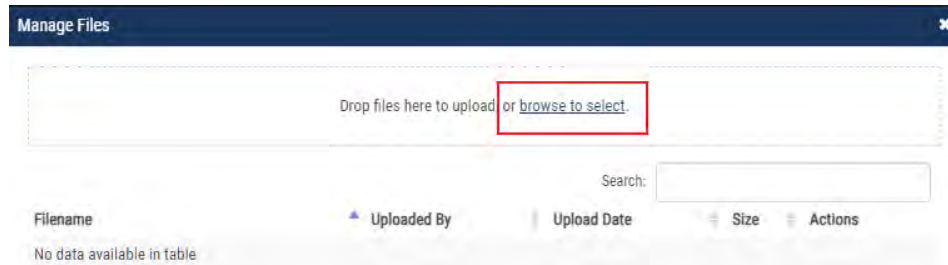
13) **Attach Files** is not a required field unless the project and grant has a Grant Tag that states UPLOAD FORM or UPLOAD MOU. If any of these apply, the Agency eCivis user must upload the SBA’s [Federal Assistance Request Form](#) or the MOU.

q. To upload files, click on the *Manage Files Icon* .

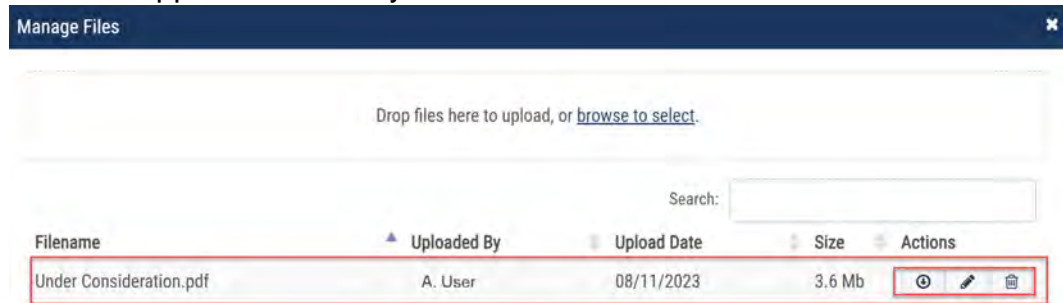
Upload Files





Attach Files: 

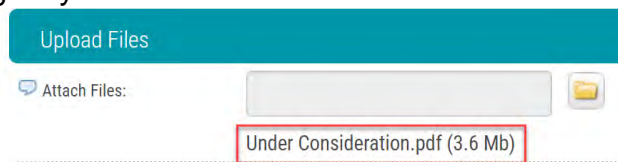
r. Click on the *Browse to Select* hyperlink to open the file browser on the Agency eCivis user’s computer. In the file browser, the Agency eCivis user will navigate and select the document the Agency eCivis user wishes to upload.



- s. Once the file is selected, a loading bar will appear. When successfully completed, the file will now appear as an entry under **Filename**.




- t. Under the **Actions** column, Agency eCivis users can perform the following actions by pressing the following icons:
- *Download Icon*  - redownloads a file to the Agency eCivis user's computer.
 - *Edit Icon*  - This allows the Agency eCivis user to rename the file.
 - *Delete Icon*  - This will remove the file from the upload process.
- u. Click on the *Close button*  at the bottom left of the **Manage Files** screen. The Agency eCivis user should now see the file in the **Upload Files** section.



- 14) The Agency eCivis user should click the *Save > button*  and the information entered will be saved, creating an eCivis Project with an active grant attached.



- 15) Upon clicking the *Save > button* , the Agency eCivis user is taken back to the **Grant Details** page. The Agency eCivis user has two options to navigate to the newly created eCivis Project.,

- a. **Grant Usage** button. The Agency eCivis user will click the Grant Usage button, and then click on their new project in the list displayed.

Home / Grant Details

FD20824 Green Mountain Energy Sun Club (Select Areas) - FY 2023

Save / Assign Email Grant **Grant Usage**

Summary

Type:	Foundation	Match Required:	No	Solicitation Date:	Rolling
Agency:	FD Foundation	Actual Funds:	Unspecified	Next Due:	Rolling
Office:	Green Mountain Energy	Payment Type:	Unspecified	Eligible Applicants:	Non Profits
Annual Giving:	\$2,337,532	Multipart Grant:	No		
Last Tax Filing:	12/22/2021				

The purpose of this program is to provide support to nonprofit organizations to advance sustainability for people and for the planet. Awards will support the funding agency's vision to see all communities achieve long-term sustainability with the quality of life and environmental resources necessary to thrive.

Grant Usage

My Saved Grants
This grant is not one of your saved grants.

Projects
This grant is attached to Green Mountain Energy Sun Club (Select Areas) - FY... in Alpha.

Allocation Funding Source
This grant is not related to an allocation source.

Close

- b. The **Grant Management** tab. The Agency eCivis user will select *My Projects* from the **Grant Management** tab at the top of the homepage. This list shows all projects for which the Agency eCivis user is either assigned as the **Project Lead** or a **Project Team** member. By selecting the *Project Name*, an Agency eCivis user is taken to the individual **Project Dashboard** for each project and grant.

eCivis

Home COVID-19 **Grant Management** Research Reports Administration


Home / My Projects

My Projects

Project Search Project Calendar Create Project

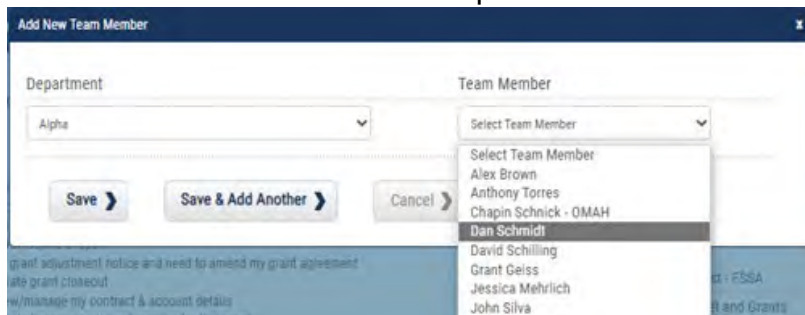
Project	Department	My Pending Tasks
2023 Basic Vocational Rehabilitation State Grant E...	Alpha	0
Community Mental Health Centers (CMHC) Grant Progr...	Department 20	0
Coronavirus State and Local Fiscal Recovery Fund	Department 1	2




Step 3: Adding Project Team Members

- 1) If additional team member(s) are identified for collaboration on a project, they must be added to the specific Project Team. On the **Project Dashboard**, the Agency eCivis user will click the + button  to the right of the **Project Team** listing to add a team member to the project.




- 2) An **Add New Team Member** pop-up window appears. The Agency eCivis user can add a team member from any department by selecting the department of the team member to be added from the *Department* dropdown menu and selecting your team member from the *Team Member* dropdown menu.



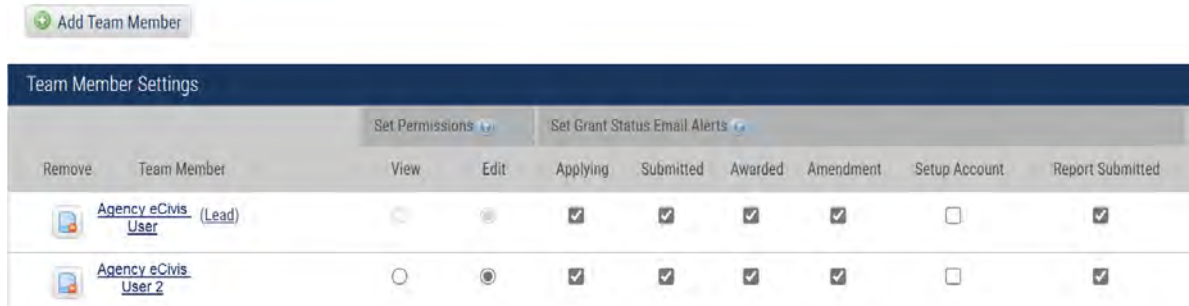
- 3) Then click *Save button* , *Save & Add Another button* , or *Close button*  to proceed.

- 4) Once the appropriate project team members are added, the Agency eCivis user will be returned to the **Project Dashboard** page to ensure all added team members appear on the **Project Team** list.



- 5) By clicking on the *Pencil button* , **Project Team** members can Set Permissions (View only or Edit access for the project and grant) and Set Grant Status Email Alerts (receipt of generated eCivis Grants Network emails regarding the project and grant) for each **Project Team** member.

Team Member Settings



- 6) **Project Team** members can change the **Project Team Lead** by clicking *(Lead)* next to the **Project Team Lead**.



- 7) This will prompt the **Change Project Lead** window. You can select a new project lead from the *New Project Lead* dropdown menu. Only **Project Team** members will appear as options.

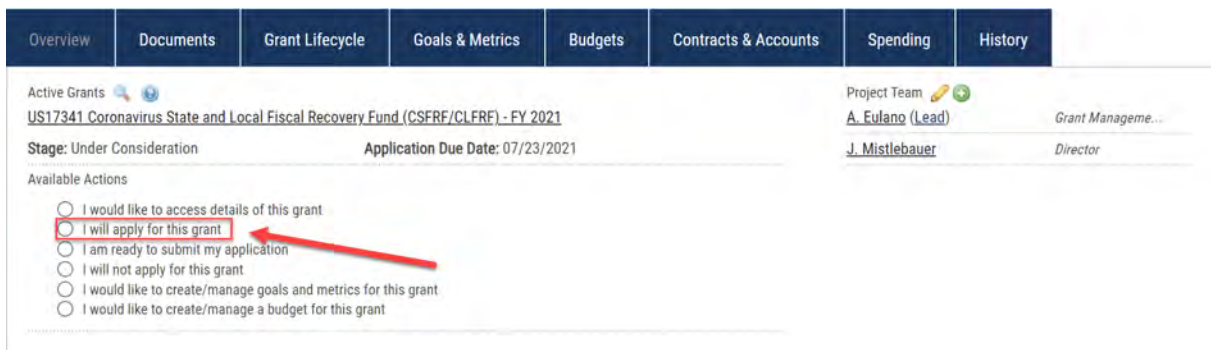


Step 4: Updating Grant Status to Application Preparation

In [Appendix C – Application Preparation](#), there is a table indicating the eCivis Grants Network fields required at **Application Preparation Stage** and the information to be entered in them. Additionally, [Appendix D – Federal Assistance Request Form](#) shows the information collected in the earlier version of the SBA [Federal Assistance Request Form](#) and the correlating field in eCivis Grants Network now. The Agency eCivis user will be responsible for those eCivis fields indicated with User entry under the Data Element Source column. If a specific stage is not indicated in that column, the Agency eCivis user will enter it in this step, **Application Preparation Stage**.

To do this, the Agency eCivis user must follow these steps:

- 1) From the **Project Dashboard**, under **Available Actions**, the Agency eCivis user will select *I will apply for this grant*.

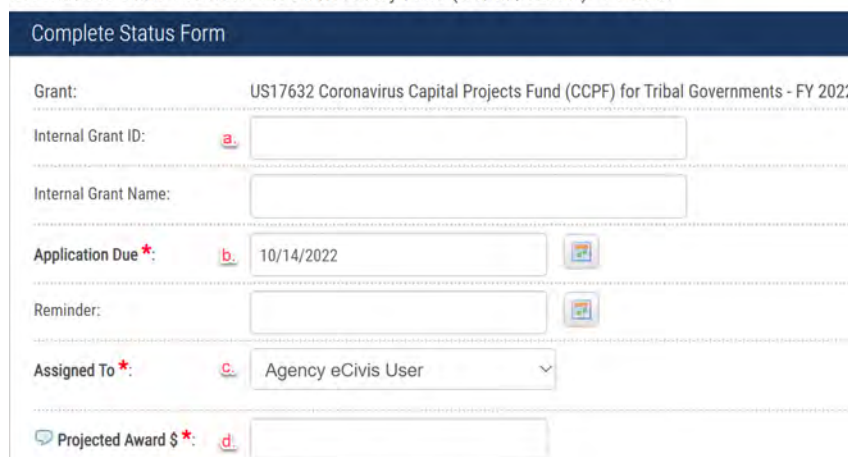


The screenshot shows the Project Dashboard for a grant titled "US17341 Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021". The grant is currently in the "Under Consideration" stage with an application due date of 07/23/2021. The "Available Actions" section lists several options, with "I will apply for this grant" highlighted by a red box and a red arrow pointing to it. Other actions include "I would like to access details of this grant", "I am ready to submit my application", "I will not apply for this grant", "I would like to create/manage goals and metrics for this grant", and "I would like to create/manage a budget for this grant".

- 2) The **Grant Status - Application Preparation** page will appear with information pre-filled from the previous stage, **Under Consideration Stage**. However, additional fields are required by eCivis, as indicated by a bolded field name and red asterisk.



Grant Status - Application Preparation

Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021



The screenshot shows the "Complete Status Form" for a grant titled "US17632 Coronavirus Capital Projects Fund (CCPF) for Tribal Governments - FY 2022". The form contains several fields, some of which are required (indicated by a red asterisk):

- Grant: US17632 Coronavirus Capital Projects Fund (CCPF) for Tribal Governments - FY 2022
- Internal Grant ID: **a.** [Text input field]
- Internal Grant Name: [Text input field]
- Application Due *****: **b.** 10/14/2022 [Text input field]
- Reminder: [Text input field]
- Assigned To *****: **c.** Agency eCivis User [Dropdown menu]
- Projected Award \$ *****: **d.** [Text input field]

- 3) Complete the following fields if they are blank or an update has occurred from the information entered at the **Under Consideration Stage**.
- The **Internal Grant ID** field is reserved for use by SBA. Both fields, **Internal Grant ID** and **Internal Grant Name**, are utilized at **Grant Awarded Stage** and discussed in more detail in [SOI User Guide - Grantee Award Management](#) including the specific process and Agency eCivis user requirements at **Grant Awarded Stage**.
 - Application Due*** may be auto generated by eCivis if given a set date by the funder. However, if the **Due Date** was **Rolling** or **Multiple**, the Agency eCivis user will need to enter the **Application Due*** date using the *Calendar Icon*  to the right of the field.
 - If the Agency eCivis user would like to set a **Reminder** for the **Application Due***, it can be set by using the *Calendar Icon*  to the right of that field. The **Reminder** emails to the **Project Team** will start on the date entered in that field and continue until an application is submitted.
 - The Application Due field should be the exact date the Application submission is due to the potential funder. Thus, SBA recommends use of this Reminder function, in addition to creating a simple task labeled “Internal Deadline”, as outlined in [12\) Pending Tasks](#).
 - Assigned To*** is the responsible **Project Team** member for the application development and preparation. This field defaults to the **Project Lead**. It can only be changed in the dropdown menu to other **Project Team** members listed. To add a Project Team member, refer to [Step 3: Adding Project Team Members](#).
 - Projected Award \$*** is the estimated application budget amount and intended award amount for this grant. This amount does not include match or cost share.
 - Match Required*** is a required field if the funder has indicated that requirement in its solicitation or Notice of Funding Opportunity (NOFO). If it is required, there will be a *Yes* entered by eCivis. A *No* or *Recommended* will not require further entry by the Agency eCivis user unless the Agency plans to provide a match or cost share.

Match Required*: e. NO

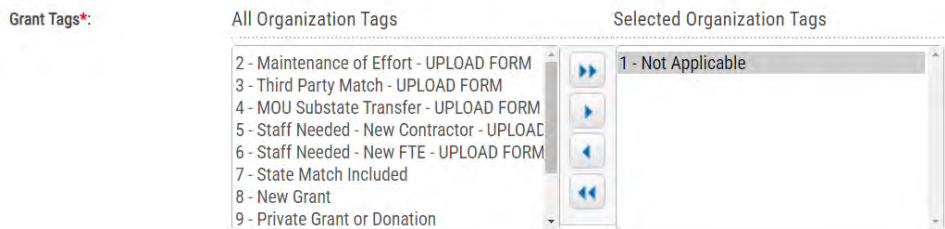
Match Type: 

Cash Match \$*:

In-Kind Value*: g.

- Match Type** is required if **Match Required*** is a “Yes.” If this field is “No,” go to step g. In the dropdown menu, there are four (4) choices:
 - Cash*
 - Match that will be addressed solely by cash.
 - Should also include any Third-Party *Cash* Match.
 - In-Kind*

- Match that will be addressed solely by an in-kind source(s).
 - Should also include any Third-Party *In-Kind* Match.
 - **Cash/In-Kind**
 - Match that will be addressed by a mix of cash and in-kind sources.
 - This is the default when **Match Required*** is *Recommended*. It can be changed to one of the other choices (Cash, In-Kind, or N/A).
 - **N/A**
 - Match does not apply to this grant.
 - This is the default when **Match Required*** is *No*.
- g. Depending on the **Match Type** selected, the **Cash Match \$*** and/or **In-Kind Value*** will become required fields.
- h. Any needed updates to the **Grant Tags***. Use the appropriate arrows to move or remove **Grant Tags*** from the **All Organization Tags** and **Selected Organization Tags** boxes.
- Any **Grant Tags*** moved back to the **All Organization Tags** box will now appear at the bottom of the listing.



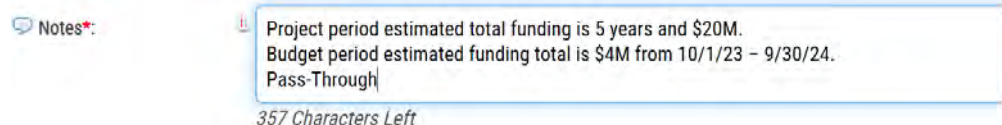
- i. **Notes*** are required at the **Application Preparation Stage**.

Project Period: The Agency eCivis user will enter the Project Period estimated funding total. For example, if a grant has multiple budget years, the Agency eCivis user would enter the number of years and the cumulative funding total e.g., Project period estimated total funding is 5 years and \$20M. The Agency eCivis user will enter the Period of Performance when different than the Project Period.


Budget Period: The Agency eCivis user will enter the Budget Period estimated funding total e.g., Budget period estimated funding total is \$4M from 10/1/23 – 9/30/24.

State Match: The Agency eCivis user will enter the fund or funds and the amount from each that the agency will use to cover the State Match.

Pass-through: If the Agency is considering using any portion of the potential award from this grant for a grant program (pass-through), the Agency eCivis user should indicate that in **Notes*** by entering *Pass-through*.

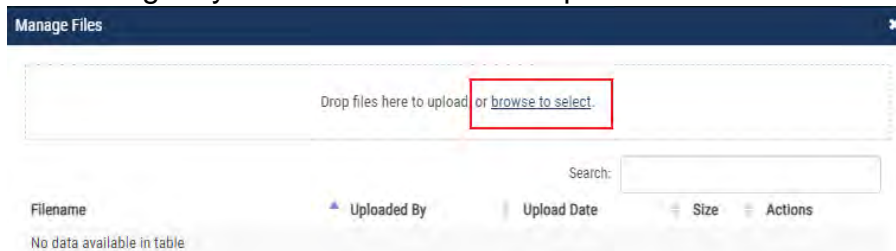


- j. **Attach Files** is not a required field unless the project and grant has a Grant Tag that states UPLOAD FORM or UPLOAD- FORM or MOU. If any of these apply, the Agency eCivis user must upload the required form, [SBA's Federal Assistance Request Form](#), or document, UPLOAD MOU.

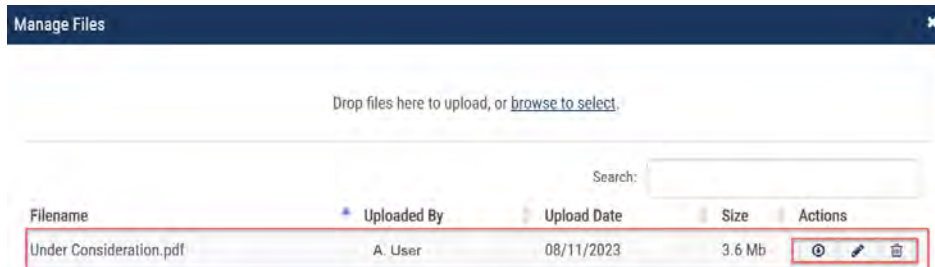
To upload files, click on the *Manage Files Icon* .






- 4) Click on the *Browse to Select hyperlink* to open the file browser on the Agency eCivis user's computer. In the file browser, the Agency eCivis user will navigate and select the document the Agency eCivis user wishes to upload.




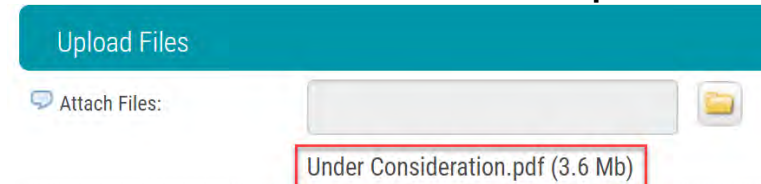
- 5) Once the file is selected, a loading bar will appear. When successfully completed, the file will now appear as an entry under **Filename**.



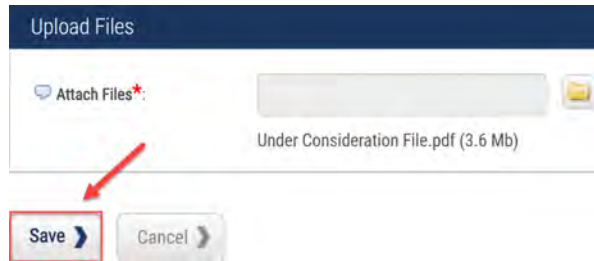
- 6) Under the **Actions** column, Agency eCivis users can perform the following actions by pressing the following icons:

- *Download Icon*  - redownloads a file to the Agency eCivis user's computer.
- *Edit Icon*  - This allows the Agency eCivis user to rename the file.
- *Delete Icon*  - This will remove the file from the upload process.

- 7) Click on the *Close button*  at the bottom left of the **Manage Files** screen. The Agency eCivis user should now see the file in the **Upload Files** section.



- 8) Once all the required information is provided click *Save button* .

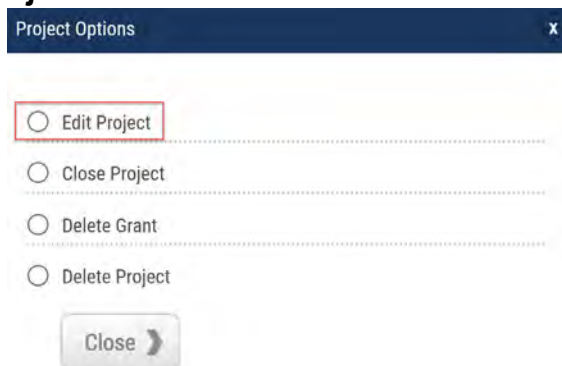


This will take the Agency eCivis user back to the individual **Project Dashboard** for the project and grant.

- 9) The **Project Start Date** and **Project End Date** are required by SBA as part of the approval process. In order to enter this information, the Agency eCivis user will need to click the *Project Options button* [Project Options](#) in the upper right-hand corner.



- 10) There are four **Project Options** but not all Agency eCivis users will have access to **Delete Grant** and **Delete Project**.
- **Edit Project** – Click to edit **Project Name***, **Project Type**, **Project State Date**, **Project End Date**, **Internal Project ID**, **Internal Project Name**, and **Project Summary***.
 - **Close Project** – This is different than closing a grant. Closing the project will remove the project from an Agency eCivis user’s **Project Dashboard**. Typically, this is done after closing a grant.
 - **Delete Grant** – This will remove the current grant assigned to the project.
 - **Delete Project** – This will delete the project from the eCivis Grants Network.
- 11) The Agency eCivis user will click *Edit Project* to enter the **Project Start Date** and **Project End Date**.



- a. The Agency eCivis user will enter the **Project Start Date** and **Project End Date**, and ensure n/a was added to “Internal Project” fields. Click the *Save> button* [Save >](#).

Edit Project

Complete Project Information

Department: Department 1

Project Name*: Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021

Project Lead: Alec Eulano

Project Type: Non-Construction Construction

Project Start Date: 03/03/2021

Project End Date: 12/31/2026

Internal Project ID: n/a

Internal Project Name: n/a

Project Summary*: Test

Save >
Cancel >

Now this project and grant are ready for SBA approval.

12) Under **Pending Tasks**, the Agency eCivis user will see three (3) tasks that have been automatically generated after moving to **App. Preparation** or **Application Preparation Stage**.

- The **Application Due** task aligns with the application due date stated in the eCivis grant listing or entered by the Agency eCivis user at **Application Preparation Stage**.
- SBA recommends the Agency eCivis User creates a simple task labeled “Internal Deadline” to serve as a reminder to finalize application materials in advance of the Application Due date. See **Appendix C – Creating Simple Tasks** of [SOI User Guide - Grantee Award Management](#) for additional guidance.

Pending Tasks		Completed Tasks	Approval History				
Task Name	Grant	Stage	Assigned To	Due	Reminder	File(s)	Done
Rqst Approval: SBA Analyst - Pursua...	ORG0125: FY2025	Application Preparation	C. Schnick	08/13/2024			<input type="checkbox"/>
Rqst Approval: SBA Grants - Pursuan...	ORG0125: FY2025	Application Preparation	C. Schnick	08/13/2024			<input type="checkbox"/>
Application Due	ORG0125: FY2025	Application Preparation	C. Schnick	08/16/2024			<input type="checkbox"/>

Add Task
Task Report
Refresh

At any point when the Indiana State Agency is ready—but no later than 10 business days before the application due date—the Agency eCivis user must receive approval by SBA via these two tasks:

- **Rqst Approval: SBA Analyst – Pursuance**; and
- **Rqst Approval: SBA Grants– Pursuance**.

13) All three tasks will be assigned to the **Project Lead** to complete and a checkbox appears under the **Done** column in the **Pending Tasks** section.

Task Name ⓘ	Grant	Stage	Assigned To	Due	Reminder	File(s)	Done
Rqst Approval: SBA Analyst - Pursua...	ORG0125: FY2025	Application Preparation	C. Schnick	08/13/2024			<input type="checkbox"/>
Rqst Approval: SBA Grants - Pursuan...	ORG0125: FY2025	Application Preparation	C. Schnick	08/13/2024			<input type="checkbox"/>
Application Due	ORG0125: FY2025	Application Preparation	C. Schnick	08/16/2024			<input type="checkbox"/>

Buttons: Add Task, Task Report, Refresh

14) If these tasks need to be reassigned to another **Project Team** member to complete, the Agency eCivis user will click the appropriate *Task Name*.

Task Name ⓘ	Grant	Stage	Assigned To	Due	Reminder	File(s)	Done
Rqst Approval: SBA Analyst - Pursua...	ORG0125: FY2025	Application Preparation	C. Schnick	08/13/2024			<input type="checkbox"/>
Rqst Approval: SBA Grants - Pursuan...	ORG0125: FY2025	Application Preparation	C. Schnick	08/13/2024			<input type="checkbox"/>
Application Due	ORG0125: FY2025	Application Preparation	C. Schnick	08/16/2024			<input type="checkbox"/>

Buttons: Add Task, Task Report, Refresh

- The task will appear in a pop-up and the **Assigned To** field can be changed to the appropriate **Project Team** member listed.

Project Task Approval X

Approval Type: Rqst Approval (Standard approval workflow) ?

Approver: SBA Grants

Name: Rqst Approval: SBA Grants - Pursuance

Grant: ORG0125 State Match Fund - IN Department of Alpha - SFY25

Stage: Application Preparation

Task Scoring Rubric*: None

Assigned To*: Chapin Schnick

Select User or User Group

Team Members

Chapin Schnick

Agency eCivis User

Due*:

15) To complete the tasks, the assigned **Project Team** member will click the *checkbox* under the **Done** column associated with each task one at a time.

Pending Tasks		Completed Tasks		Approval History			
Task Name	Grant	Stage	Assigned To	Due	Reminder	File(s)	Done
Rqst Approval: SBA Analyst - Pursua...	ORG0125: FY2025	Application Preparation	C. Schnick	08/13/2024			<input type="checkbox"/>
Rqst Approval: SBA Grants - Pursuan...	ORG0125: FY2025	Application Preparation	C. Schnick	08/13/2024			<input type="checkbox"/>
Application Due	ORG0125: FY2025	Application Preparation	C. Schnick	08/16/2024			<input type="checkbox"/>

Add Task Task Report Refresh

16) The **Approval Request Form** will appear and the Agency eCivis user clicks the *Save > button* Save >.

- If the Agency eCivis user wants to provide any information it feels is appropriate, or SBA should know about the project and grant as it pertains to its approval, the Agency eCivis user can enter that information in **Notes to Approver**.



Approval Request Form

Approval Request Form

Project: State Match - NEA Arts Partnership Part B - SFY25


Grant: ORG0125 State Match Fund - IN Department of Alpha - SFY25



Task: Rqst Approval: SBA Analyst - Pursuance - Alpha




Attachments : 

Description: SBA approval for the agency to apply for the listed federal assistance, as mandated by FMC 4.1 Federal Assistance Management Requirements.
This is the first of two steps required to obtain pursuance approval.
- Attach a completed Federal Assistance Request Form (FARF) if required by the selected "Grant Tag(s)".

Approver: SBA Budget - Alpha





Approval Due*: 


Reminder:  

Files to Forward :  SBA Federal Assistance Request Form (13.4 Kb)
  State Match Request (160.0 Kb)

Notes to Approver:
1000 Characters Left

- 17) Once the Approval Request Form is saved, the task will be assigned to the appropriate SBA representative to complete. Again, the Agency eCivis user will perform this action for both tasks and will see the task reassigned to the SBA Analyst and SBA Grants.

Pending Tasks		Completed Tasks	Approval History						
Task Name	Grant	Stage	Assigned To	Due	Reminder	File(s)	Done		
 Approval Reqd: SBA Analyst - Pursua...	ORG0125: FY2025	Application Preparation	SBA Budget - Alpha	08/13/2024					
 Approval Reqd: SBA Grants - Pursuan...	ORG0125: FY2025	Application Preparation	SBA Grants	08/13/2024					

- 18) Project **Team** members and Agency Department Master Account Holders (DMAHs) can click the *Completed Tasks* tab within a project to see all completed tasks, completed date, **Project Team** member that completed the task, etc. In the **Completed Tasks** page, click the *+Open button*  to the right of the Grant Title Banner to view this screen.

Completed Tasks

Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021

US17341 Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021 Minimize									
Stage	Task Name	Due	Completed On	Completed By	Download Files	Manage Files	Edit Task	Scoring Rubric	Notes
Application Preparation	Rqst Approval: SBA Analyst - Pursuance - Alpha	08/04/2023	08/03/2023	Project Lead					
Application Preparation	Rqst Approval: SBA Grants - Pursuance	08/04/2023	08/03/2023	Project Lead					

- 19) Once the appropriate SBA representatives complete the tasks, the **Project Lead**, **Project Team** members, and the Agency's DMAHs will receive eCivis-generated email notifications that grant pursuance has been approved or that further information has been requested.



- a. For approval tasks, the **Project Lead**, **Project Team** members, and the Agency's DMAHs can click the *Approval History* tab within a project to see all approvals completed, approval date, approver name, etc.



Project Dashboard: Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021 - SLFRF001

Department: State Budget Agency



- b. If during one of the approval tasks, SBA requests more information from the Agency, the Agency will receive an email from eCivis Grants Network indicating that fact. Additionally, the task in eCivis Grants Network will be reassigned to the originating **Project Team** member who completed the task. The email and reassigned task will indicate the information requested by SBA.

Pending Tasks		Completed Tasks		Approval History			
Task Name	Grant	Stage	Assigned To	Due	Reminder	File(s)	Done
Approval Req; SBA Analyst - Pursua...	ORG0125: FY2025	Application Preparation	SBA Budget - Alpha	08/13/2024			
Info Rqst: SBA Grants - Pursuance	ORG0125: FY2025	Application Preparation	C. Schnick	08/15/2024			<input type="checkbox"/>

- c. When the Agency has gathered the requested information, the assigned **Project Team** member can complete the task by clicking the *Done checkbox*, uploading any documentation by clicking the *Folder Icon*  and uploading the document, entering any Notes back to SBA, and clicking the Save > button .



Resubmit Approval Request Form

Resubmit Approval Request Form

Project: Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021


Grant: US17341 Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021



Task: Info Rqst: SBA Grants - Pursuance


Attachments  

Notes from Approver: Need more information.

Approver: SBA Grants
















Approval Due*: 

Reminder:  

Files to Forward : No files are currently attached.

Notes to Approver:
1000 Characters Left

- d. The approval task will reappear and be assigned to the appropriate SBA representative to complete.

Pending Tasks	Completed Tasks	Approval History																								
		<table border="1"> <thead> <tr> <th>Task Name </th> <th>Grant</th> <th>Stage</th> <th>Assigned To</th> <th>Due</th> <th>Reminder</th> <th>File(s)</th> <th>Done</th> </tr> </thead> <tbody> <tr> <td> Approval Req: SBA Analyst - Pursua...</td> <td>ORG0125: FY2025</td> <td>Application Preparation</td> <td>SBA Budget - Alpha</td> <td>08/13/2024</td> <td></td> <td></td> <td><input type="checkbox"/></td> </tr> <tr style="border: 2px solid red;"> <td> Approval Req: SBA Grants - Pursuan...</td> <td>ORG0125: FY2025</td> <td>Application Preparation</td> <td>SBA Grants</td> <td>08/13/2024</td> <td></td> <td></td> <td><input type="checkbox"/></td> </tr> </tbody> </table>	Task Name 	Grant	Stage	Assigned To	Due	Reminder	File(s)	Done	 Approval Req: SBA Analyst - Pursua...	ORG0125: FY2025	Application Preparation	SBA Budget - Alpha	08/13/2024			<input type="checkbox"/>	 Approval Req: SBA Grants - Pursuan...	ORG0125: FY2025	Application Preparation	SBA Grants	08/13/2024			<input type="checkbox"/>
Task Name 	Grant	Stage	Assigned To	Due	Reminder	File(s)	Done																			
 Approval Req: SBA Analyst - Pursua...	ORG0125: FY2025	Application Preparation	SBA Budget - Alpha	08/13/2024			<input type="checkbox"/>																			
 Approval Req: SBA Grants - Pursuan...	ORG0125: FY2025	Application Preparation	SBA Grants	08/13/2024			<input type="checkbox"/>																			

20) At this point, the Agency has either received its approval to pursue this grant program or a denial.

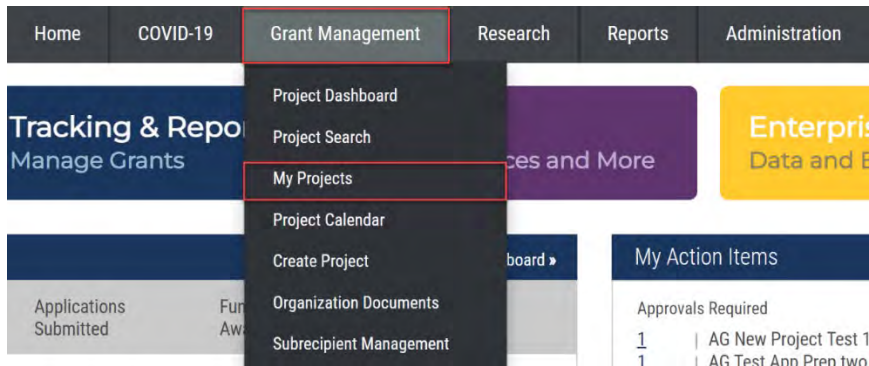
If approved, the Agency can use eCivis to manage its application development by creating and assigning tasks internal to the **Project Team** for the different application components—such as project narrative, budget, Federal Standard Forms, etc. These documents can be saved within the Project and completed tasks can be tracked to ensure that the Agency and **Project Team** are on schedule to submit their application by the stated **Application Due** date in the eCivis Grants Network system.

If not approved/ “denied”, the SBA Grants Team will select “Will not apply” from the eCivis Project’s Available Actions, adding relevant information to the Notes field and Pursuance Request task. This enables SBA to document the basis for the denial and provide information for decision-making in the event the agency considers the grants in the future.

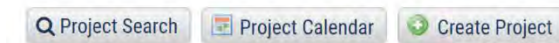
Step 5: Updating Grant Status to Application Submitted

When the Indiana State Agency's application is submitted to the funder via the funder's application submission process (and system), the next step for the Agency eCivis user (as an applicant and grantee) is to move the project forward in eCivis to **Application Submitted Stage**. See [Appendix E – Application Submitted](#) for additional support.

- 1) On the eCivis Homepage, the Agency eCivis user will select *My Projects* from the **Grant Management** tab. From that list, click the name of the project to be updated.



My Projects



Project	Department	My Pending Tasks
Coronavirus Capital Projects Fund (CCPF): For Stat...	Alpha	0
Coronavirus State and Local Fiscal Recovery Fund (...	Department 1	0

- 2) From the **Project Dashboard**, click on the box under the Done column for the Application Due task in the Pending Tasks section.

Task Name	Grant	Stage	Assigned To	Due	Reminder	File(s)	Done
Application Due	US5896: FY2023	Application Preparation	L. Kenworthy	09/30/2023			<input type="checkbox"/>

- This also can be completed from the *Available Actions* list by selecting *I am ready to submit my application*.

Overview Documents Grant Lifecycle Goals & Metrics Budgets Contracts & Accounts Spending History

Active Grants

US17341 Coronavirus State and Local Fiscal Recovery Fund (CSFR/CLFR) - FY 2021

Stage: App. Preparation Projected: \$80,000,000.00 Match: \$0.00

Available Actions

- I would like to access details of this grant
- I am ready to submit my application
- I will not apply for this grant
- I would like to create/manage goals and metrics for this grant
- I would like to create/manage a budget for this grant

Project Team

Project Lead (Lead)

Agency eCivis User


Designated for Approvals

User Groups

- SBA Analyst - FSSA
- SBA Grants

- 3) On the **Grant Status - Application Submitted** page, review the information that is pre-filled from previous stages and enter the missing information.

The following fields need information entered if there are missing entries at **Application Preparation Stage**.


- The **Internal Grant ID** field is reserved for use by SBA. Both fields, **Internal Grant ID** and **Internal Grant Name**, are utilized at **Grant Awarded Stage** and discussed in more detail in [SOI User Guide - Grantee Award Management](#) including the specific process and Agency eCivis user requirements at **Grant Awarded Stage**.
- App Submitted*** field is the date that the application was submitted to the funder/funding agency. The Agency eCivis user will click the *Calendar Icon*  beside the field to populate with the appropriate date.
- Completed By*** is the **Project Team** member who submitted the application; this should be selected from the dropdown menu.
- The next few fields, **Projected Award \$***, **Match Required*** (along with its associated fields), and **Grant Tags***, have been populated with the information entered in the earlier Stages. They can be edited if needed by clicking the appropriate field to be edited and changing the information to match the Agency's application submitted.
- Notes*** field is required, and any previous entry is not carried forward to **Application Submission**. If the Agency eCivis user has nothing to enter in **Notes***, they can enter "n/a" for not applicable.

Complete Status Form

Grant: US5896 PHMSA Natural Gas Base Grant (Limited Eligibility) - FY 2023

Internal Grant ID:

Internal Grant Name:

App Submitted*: 

Completed By*: Luke Kenworthy

Projected Award \$*: 1,200,000.00

Match Required*: YES

Match Type*: Cash

Cash Match \$*: 500,000.00

In-Kind Value:

Grant Tags*: All Organization Tags Selected Organization Tags


2 - Maintenance of Effort - UP
 3 - Third Party Match - UPLOA
 4 - MOU - UPLOAD FORM or
 5 - Staff Needed - New Contra
 6 - Staff Needed - New FTE -
 7 - State Match Included
 Activity
 Financial
 Maintenance


1 - Not Applicable

Notes*:

500 Characters Left

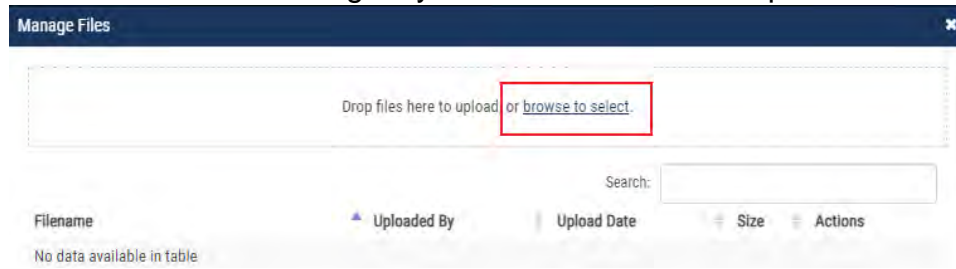
Upload Files

Attach Files*: 

- f. **Attach Files*** is a required field at this stage. The Agency eCivis user should upload the entire application packet. For federal applications, this is the Standard Form (SF) 424 family of documents.
 - a. An application is any form, report(s), or other type of communication submitted to a funder to receive assistance.
 - b. If no application is required for this grant opportunity, the Agency eCivis User must upload their agency's "State Plan" as their application and include the date executed in the Notes field.
- To upload files, click on the *Manage Files Icon* .







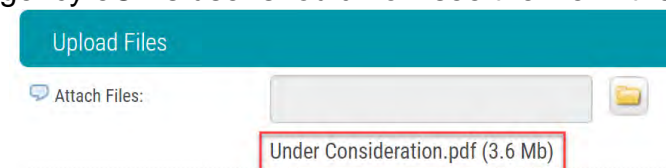
- Click on the *Browse to Select hyperlink* to open the file browser on the Agency eCivis user's computer. In the file browser, the Agency eCivis user will navigate and select the document the Agency eCivis user wishes to upload.





- Once the file is selected, a loading bar will appear. When successfully completed, the file will now appear as an entry under **Filename**.



- Under the **Actions** column, Agency eCivis users can perform the following actions by pressing the following icons:
 - *Download Icon*  - redownloads a file to the Agency eCivis user's computer.
 - *Edit Icon*  - This allows the Agency eCivis user to rename the file.
 - *Delete Icon*  - This will remove the file from the upload process.
- Click on the *Close button*  at the bottom left of the **Manage Files** screen. The Agency eCivis user should now see the file in the **Upload Files** section.



- 4) Once the above-required information is entered, click the *Save > button* .

Click the *Save > button* .

7) The grant and project are now at the **App. Submitted (Application Submitted) Stage**.



The screenshot displays the eCivis grant management interface. At the top, there is a navigation bar with tabs for Overview, Documents, Grant Lifecycle, Goals & Metrics, Budgets, Contracts & Accounts, Spending, and History. Below the navigation bar, the main content area shows the grant details for 'US17341 Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF) - FY 2021'. The 'Stage' is 'App. Submitted', which is highlighted with a red box. The 'Projected' amount is '\$80,000,000.00' and the 'Match' is '\$0.00'. On the right side, the 'Project Team' section lists 'A. Eulano (Lead)' and 'J. Mistlebauer'. Below the team list, there are sections for 'Designated for Approvals', 'User Groups' (including 'SBA Analyst - FSSA', 'SBA Budget and Grants', and 'SBA Grants'), and 'Available Actions' with a list of radio button options.

Conclusion

Once the Agency eCivis user has received an award notification (either that the grant was awarded or not awarded), the Agency eCivis user should view [SOI User Guide - Grantee Award Management](#) for instructions on award and post-award management in eCivis.

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.

Agreement – May also be referred to as grant agreement or subaward. It is a legal instrument executed to provide financial assistance to a Grantee/Subrecipient. See Notice of Award (NOA).

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.

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 the Grantee or subrecipient reports financial information at the level of detail required by each grant program.

Budget Period – The time interval from the start date of a funded portion of an award to the end date of that funded portion during which recipients are authorized to expend the funds awarded, including any funds carried forward or other revisions.

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.

Competitive Funding – Funding where the Grantor may select the Grantee(s) from all eligible Grantees/Applicants; may decide to make or not make an award based on the programmatic, technical, or scientific content of an application; and can decide the amount of funding to be awarded.

Department – An Indiana State Agency may have one or more departments within eCivis Grants Network representing their divisions, sections, offices, 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.

Discretionary Funding – See Competitive Funding.

eCivis – The software vendor that created eCivis Grants Network (Indiana State Agencies as Grantees/Grantors) and eCivis 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.

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

Funder – See Grantor.

Funding Opportunity Number (FON) – A unique number a Federal agency assigns to a grant announcement.

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 Stage – The status of a Grantee project and grant in eCivis Grants Network. There are eleven Grant Stages in eCivis Grants Network. They are:

- Under Consideration – the Indiana State Agency is vetting the grant program internally for further pursuance and application.
- Will Not Apply – the Indiana State Agency decided to pursue the grant program but eventually did not apply.
- Will Not Pursue – following the Indiana State Agency's internal vetting process, the decision was made not to pursue the grant program.
- Award Projected – the Funder/Grantor informed the Indiana State Agency that its project was awarded without funding allocated to it.
- Application Preparation – the Indiana State Agency is developing its application for submission.
- Application Submitted – the Indiana State Agency applied to the funder.
- Not Awarded – the Indiana State Agency received a non-award notification from the Funder/Grantor.
- Implementation – post-award when reporting starts on the awarded project and grant.
- Grant Awarded – the Indiana State Agency received an award notification with funding for its submitted application.
- Funding Allocated – an awarded project and grant provides funding to other Indiana State Agencies through specific functionality in eCivis Grants Network.
- Grant Closeout – after Implementation, the process of finalizing the funding received and expended along with submission of any final reports.

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

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. 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.

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

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](#)).

Memorandum of Understanding (MOU) – Considered formalized written documents between State agencies that involve programmatic and/or fiscal issues and enunciate mutual understandings, agreements, duties, responsibilities, policies, procedures, timeframes, and other matters as necessary and appropriate ([SBA FMC 3.4](#)).

Non-Competitive Funding – Funding in which the awarding agency has selected the Recipients and/or the amount of funding through formula, criteria, or non-competitive means.

Notice of Award (NOA) – A legal document notifying the Recipient that an award has been made and funds may be requested from the awarding agency.

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.

Organization Tags – Also, referred to as Grant Tags. See Grant Tags definition.

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

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.).

Project – See Grantee Project.

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

Project Period – See Period of Performance.

Search Agent – In eCivis Grants Network, Agency eCivis users can create parameters for their research and pursuance needs and priorities based on a keyword(s), funding categories, grant types and Funders, eligibility, application due dates, and match requirements. The established Search Agent can be saved and Agency eCivis users automatically informed via their email address on their accounts of new grants added to

the eCivis Grants Network that fit the parameters of the Search Agent. Each Agency eCivis user has 50 Search Agents they can create and save.

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.

Appendix A – Organization Funding

SBA Requirements for Federal Grants and Organization Funding Guidance

Funding opportunities that do not appear in the eCivis Grants Network **Search for Grants** feature will need to be entered as Organization Funding. To search for a funding opportunity in eCivis Grants Network, Agency eCivis users will need to utilize the **Search for Grants** feature. Additionally, Agency eCivis users will need to ensure that the funding opportunity does not already exist in Organization Funding. If the proposed funding opportunity is absent in both areas, it may be entered into Organization Funding.

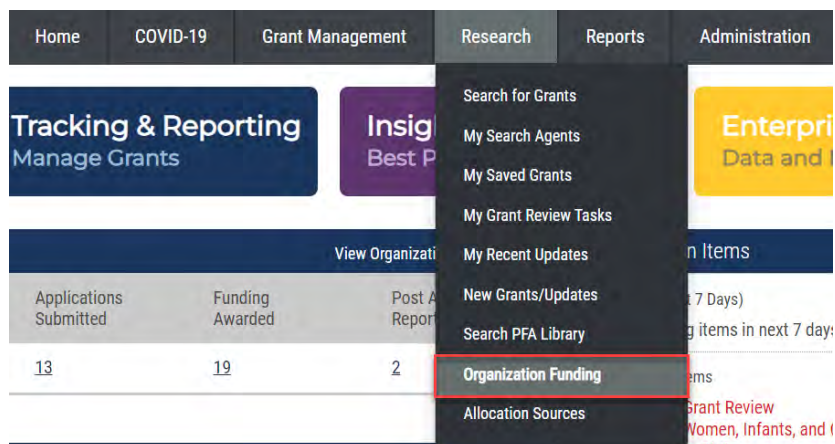
While the criteria for which grants are included in eCivis Grants Network’s **Search for Grants** is not exact, formula or allocation grants are not typically included. Furthermore, older or archived grants may also be absent.


The following award types need to be entered as Organization Funding:

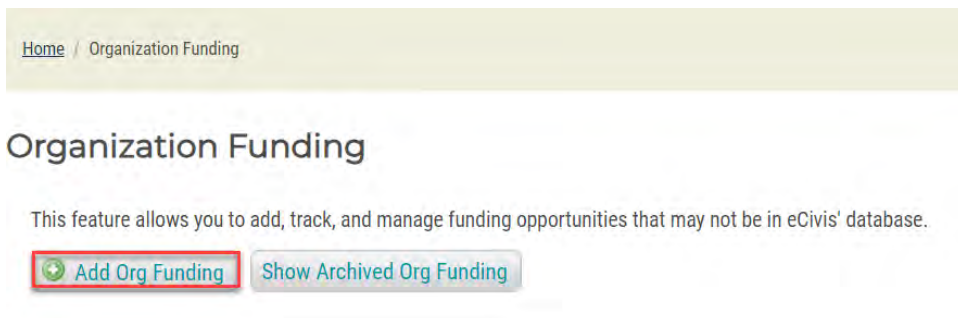
- 1) Grants not found in **Search for Grants**
 - a. Federal
 - b. Non-Federal
- 2) Federal Contracts
- 3) Federal Cooperative Agreements
- 4) Program Income
- 5) State-to-State/Department Transfers (Memorandums of Understanding or MOUs)
- 6) State General Fund (for eCivis Grants Network Grantor/Subrecipient Management usage)
- 7) State Match (SBA will create this fund for each agency annually)

Below are the steps to creating Organization Funding for federal grants (competitive and non-competitive). While the steps remain the same, additional criteria for non-federal grants, federal cooperative agreements and contracts, and program income, see the [State of Indiana eCivis Grants Network Policy: Organization Funding](#) (coming soon).

- 1) At the homepage, the Agency eCivis user will hover over the **Research** tab and click on *Organization Funding*.

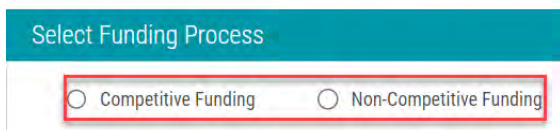


- 2) On the Organization Funding page, the Agency eCivis user will click + Add Org Funding .



- 3) The Agency eCivis user will need to select whether the funding opportunity is competitive or non-competitive. SBA requires that Agency eCivis users always select competitive when non-state entities are the funder.

Add Organization Funding



- 4) The **Funding Title*** for Federal grant opportunities will be the title from the NOFO, NOA, Grants.gov listing, and/or the SAM.gov Assistance Listing. An Agency eCivis user will also include the Federal Fiscal Year (“FFY”) at the end of the title (this will match Fiscal Year entered in the **Fiscal Year** field). Unless otherwise specified in the award, the FFY begins on October 1st and ends on September 30th with calendar year starting in January. For example:
- The Indiana Department of Transportation was awarded a Federal grant on July 1, 2023. The **Funding Title** should be: Charging and Fueling Infrastructure (CFI) Discretionary Grant Program - FFY23.

NOTE: Only Federal Fiscal Year (“FFY”) or State Fiscal Year (“SFY”) are to be used.

FFY: for Federal or Substate Transfer eCivis Projects

SFY: for State Match eCivis Projects, or [State-Funded Grant](#) Org Funding

- 5) For **Funding Type***, “Federal” will be selected from the dropdown menu. **Agency*** is the name of the Funder. Agency eCivis users may refer to their NOA for the correct *Agency* name. Additionally, Agency eCivis users can find their Federal grant name in the Assistance Listing search in SAM.gov for the official name. To assist with *Agency* naming conventions, please see **Section 14 – Funding Naming Conventions** of the *State of Indiana eCivis Grants Network Policy and Procedures: Organization Funding* for the naming conventions of Federal agencies. The naming conventions follow the parent agency and not the division within a department. For example:

- a. U.S. Customs and Border Protection would be the U.S. Department of Homeland Security.
- b. National Highway Traffic Safety Administration would be the U.S. Department of Transportation.
- c. Food and Drug Administration would be the U.S. Department of Health and Human Services.

The screenshot shows a form titled "Funding Identification" with the following fields:

- Funding Title ***: Text input field with a character count of "150 Characters Left".
- Fiscal Year ***: Dropdown menu currently set to "2023".
- Funding Type ***: Dropdown menu.
- Agency ***: Dropdown menu with a list of options: County/Regional, Federal, Foundation, Other, State, and Tribal.
- Office**: Text input field with a character count of "700 Characters Left".
- FAIN**: Text input field.
- CFDA/ALN Number**: Text input field.
- Organization ID**: Text input field.
- Grant Contact**: Text input field.

- 6) The **Office**, **FAIN** (Federal Award Identification Number), **Organization ID**, and **Grant Contact** fields are recommended but not required. For Federal grants, the CFDA Number (Catalog of Federal Domestic Award; or now officially the Assistance Listing Number) is a required field.
- 7) Under the **Application/Financial** box, additional fields will appear when **Competitive Funding** is selected.
 - The **Due Date Type*** field will populate four dropdown options of “Verified,” “Rolling,” “Varies,” and “Unknown”.
 - a. Selecting “Verified” signifies a specific date known for the application submission deadline which causes the **Application Due*** field to appear.
 - b. *Rolling* means applications are accepted throughout the funding cycle/ FY.
 - c. **Varies** signifies there are multiple due dates.
 - d. **Unknown** means there is no indication of a due date (Agency eCivis users will never select **Unknown**.
 - **Application Due** is completed with a calendar-based selection.

Select Funding Process

Competitive Funding Non-Competitive Funding

Funding Identification

Funding Title *:
150 Characters Left

Fiscal Year *: 2023

Funding Type *:

Agency *:

Application/Financial

Due Date Type *: Verified

Application Due *:

Total Funds *:

Matching Required *:

Match Type *:

- 8) **Total Funds*** is the entire allocation for the grant program being released by the Grantor/Funder to all Applicants. This value does not signify or impact on the total amount of funding. For this type of Organization Funding, the default amount of \$1,000,000,000 (\$1B) will be entered.

Funding Title *:
150 Characters Left

Fiscal Year *: 2023

Total Funds *:

Matching Required *:

Match Type *:

- 9) **Matching Required*** has three dropdown options consisting of “Yes,” “No,” or “Recommended.” This refers to the Funder requiring a match/cost share of any kind as part of the application and award process.

Application/Financial

Due Date Type *: Verified

Application Due *:

Total Funds *:

Matching Required *:

Match Type *:

Yes
No
Recommended

- 10) **Match Type*** has three dropdown options consisting of “Cash,” “In-Kind,” or “Cash/In-Kind.”

- Cash means other funding can be leveraged directly for the match/cost share.
- “In-Kind” means that sources other than funds can be leveraged to satisfy the match/cost-share requirement such as unallowed costs/expenditures of the grant program as stated within the program guidance, third-party services/donations, etc.
- “Cash/In-Kind” signifies that both options are allowable in the funding opportunity.



11) The next three sections—**Summary**, **Categories**, and **Eligibility**—while not bolded with a red asterisk, are required by eCivis Grants Network.

- For the **Summary** section, the Agency eCivis user will input text that outlines a brief overview of the funding opportunity. Source documents may be leveraged for language, but the Agency eCivis user must ensure formatting issues are corrected if cut and pasted. Acronyms or abbreviations are not appropriate in this section.
- For the **Categories** section, select the most appropriate funding category for the funding opportunity. Multiple categories can be selected if needed, but only one is required.
- Lastly, select “State Government” for the **Eligibility** section to indicate the State of Indiana is pursuing this funding opportunity.

Summary

Give a brief overview of the activities supported by the funding opportunity as described in the funding announcement.

5000 Characters Left

Categories

<input type="checkbox"/> Agriculture	<input type="checkbox"/> Health, Prevention/Treatment	<input type="checkbox"/> Rural Issues
<input type="checkbox"/> Animal Welfare	<input type="checkbox"/> Health, Research	<input type="checkbox"/> Science/Technology
<input type="checkbox"/> Arts & Culture	<input type="checkbox"/> Housing	<input type="checkbox"/> Senior Citizens
<input type="checkbox"/> Community Development	<input type="checkbox"/> Human Services	<input type="checkbox"/> Social Justice
<input type="checkbox"/> Disaster Preparedness	<input type="checkbox"/> IT/Telecommunications	<input type="checkbox"/> Solid Waste
<input type="checkbox"/> Domestic Prep./Homeland Security	<input type="checkbox"/> Justice, Prevention/Correction/Rehab	<input type="checkbox"/> Tourism and Hospitality
<input type="checkbox"/> Economic Development	<input type="checkbox"/> Justice, Victims	<input type="checkbox"/> Training & Vocational Services
<input type="checkbox"/> Education	<input type="checkbox"/> Justice, Youth	<input type="checkbox"/> Transportation
<input type="checkbox"/> Energy	<input type="checkbox"/> Law Enforcement	<input type="checkbox"/> Wastewater
<input type="checkbox"/> Environment/Natural Resources	<input type="checkbox"/> Libraries	<input type="checkbox"/> Water Supply/Quality
<input type="checkbox"/> Fire/EMS	<input type="checkbox"/> Parks & Recreation	
<input type="checkbox"/> Hazardous Waste/Brownfields	<input type="checkbox"/> Recycling & Reuse	

Eligibility

<input type="checkbox"/> Local Government	<input type="checkbox"/> Non Profits	<input type="checkbox"/> State Government
<input type="checkbox"/> Academic Institutions	<input type="checkbox"/> Other	<input type="checkbox"/> Tribal Organizations/Institutions
<input type="checkbox"/> Consortia	<input type="checkbox"/> Private Sector	
<input type="checkbox"/> Native American Tribe	<input type="checkbox"/> Schools/School Districts	

12) The fields under **Attachments** allow Agency eCivis users to provide a website link and/or upload document(s) related to creating the eCivis Grants Network funding opportunity. Although this section is not required by eCivis Grants Network, the SBA requires it to verify the data elements entered. Therefore, for each Federal grant opportunity, the Agency eCivis is required to provide the submitted application (after an application is submitted) as well as one of the following:

- Notice of Funding Opportunity (“NOFO”);
- Grants.gov listing, and/or;
- SAM.gov Assistance Listing;


- Website or page of the funding opportunity from the Funder.

Attachments

Reference URL:

Enter the granting agency's website for future reference. For example, http://...

Attach Files: 

13) The Agency eCivis user will click the Save > button  and be directed back to the **Organization Funding** homepage.

14) From here, the Agency eCivis user can assign the new Organization Funding to a new project:




- By clicking the *Save/Assign Grant* icon  to the right of the *Funding Title* under **Actions**

GN Code	Funding Title	Fiscal Year	Funding Type	Total Funds	App Due	Actions
ORG0019	Charging and Fueling Infrastructure (CFI) Discretionary Grant Program - FFY23	2023	Competitive	\$500,000	07/03/2023	    

- Or by clicking the *Funding Title* link and then on the *Save/Assign Grant* icon. 

GN Code	Funding Title	Fiscal Year	Funding Type	Total Funds	App Due	Actions
ORG0019	Charging and Fueling Infrastructure (CFI) Discretionary Grant Program - FFY23	2023	Competitive	\$500,000	07/03/2023	    

ORG0019 Charging and Fueling Infrastructure (CFI) Discretionary Grant Program - FFY23

 Save / Assign  Email Grant  Grant Usage

Summary	Eligibility/Application	Financial	Contact/Files
<p>Type: Federal</p> <p>Agency: U.S. Department of Transportation</p>		<p>Next Due: 07/03/2023 (Due Date)</p> <p>Match Required: Yes</p> <p>Actual Funds: \$500,000</p>	
<p>Summary:</p> <p>Charging and Fueling Infrastructure Grant.</p>			

Appendix B – Organization Funding: Multi-Years

As described in [Appendix A – Organization Funding](#), funding opportunities that do not appear in the eCivis Grants Network **Search for Grants** feature will need to be entered as Organization Funding. When Organization Funding represents a Multi-Year Project Period or Award, Indiana State Agencies can link each subsequent FFY's eCivis Project to one Multi-Year Organization Funding.

Single-Year Org Funding Title: [Title from the NOFO] - FFY##

Multi-Year Org Funding Title: [Title from the NOFO] - FFY##-##

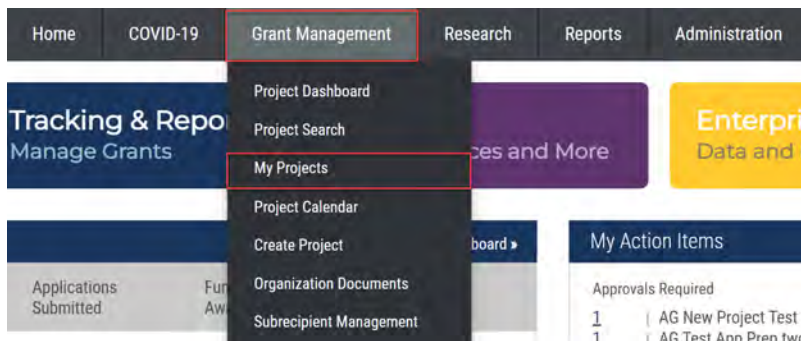
Where the FFY #s represents the range of Project Start to Project End Date.

In addition to providing the FFY Project Date range in the Funding Title of the Multi-Year Organization Funding, each individual associated Budget Period will have its own eCivis Project with the full Project Period added to Project Options, as described in 9) of [Step 4: Updating Grant Status to Application Preparation](#).

Appendix C – Multi-Year Project Periods/Multi-Award Grants

The Agency eCivis user will use the same grant for Year 2 and beyond that was attached to Year 1. The Agency eCivis user does this by following the below process.

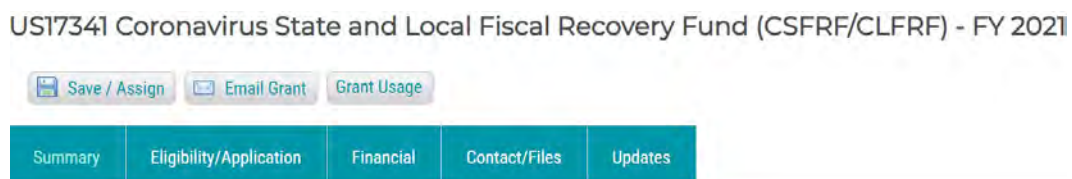
- 1) On the eCivis Homepage, the Agency eCivis user will select *My Projects* from the **Grant Management** tab. From that list, click a project name ready for Year 2 or more.



- 2) On the **Project Dashboard** page from the *Available Actions* list, select *I would like to access details of this grant*.



- 3) This takes the Agency eCivis user to the **Grant Details** page. The Agency eCivis user should click the *Save/Assign button*  **Save / Assign**.



- 4) The **Save/Assign** pop-up window will appear with a list of options. The State of Indiana has implemented a one grant to one project policy. Therefore, the Agency eCivis user must always select, *Assign grant to a new project.*

- 5) In **Step 1. Select Department & Project**, choose a **Department*** from the dropdown.

- 6) The **Project*** field still has the specific naming convention requirement which shares the same name as the **Grant** field minus the **GN Code**. However, for multi-year project periods/multiple award grants, the Agency eCivis user will change the stated Fiscal Year in the current **Grant** to the appropriate Fiscal Year needed for the grant award in that multiple-year project period.

IMPORTANT: The Agency eCivis user will enter the same name as the **Grant** (minus the prefix eCivis identifier or “**GN Code**”). E.g., US17341 was removed from the **Project*** below by copying and pasting the **Grant** field into the **Project*** field without the **GN Code**.

- 7) From here, the Agency eCivis user can return to [Step 2: Save/Assign a Grant to a New Project](#) in the guide and complete all required fields as stated (**Project Lead***, **Project Type***, Internal Project ID, Internal Project Name, **Project Summary***, **Is an application required for this grant?***, **Grant Status***, and **Grant Tags***) to Save/Assign this grant to the project.

Project Summary*:

1500 Characters Left

2. Select Funding Status

Is an application required for this grant?*


Yes No

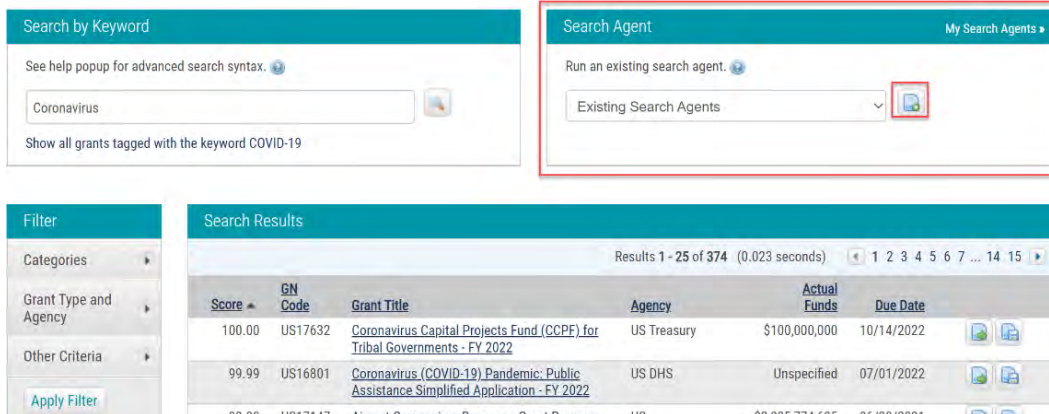
Save >

Cancel >







Appendix D – Grant Search Agents


Agency eCivis users can create search agents after executing a search in the **Search For Grants** page on eCivis. This function will allow saved searches to be executed anytime and the option to set up automatic email alerts whenever there are updated results. For assistance completing a grant search, refer to [Step 1: Searching for a Grant](#).

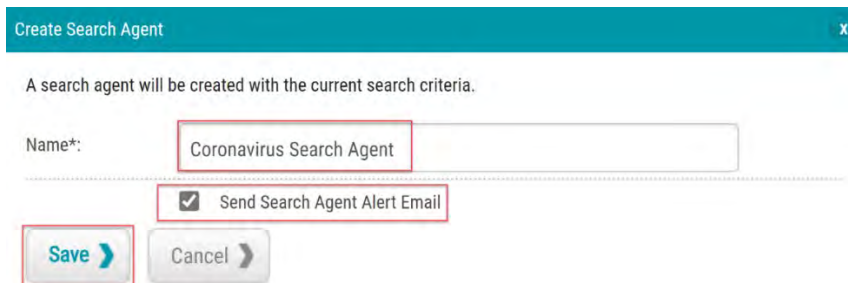
- 1) Once the Agency eCivis user has executed a search on the **Search Results** page they may click the *Run Icon*  in the **Search Agent** section.




The screenshot shows the 'Search by Keyword' section with the keyword 'Coronavirus' and a 'Run Icon' (document with magnifying glass) next to it. Below this is the 'Search Agent' section, which is highlighted with a red box. It contains a dropdown menu labeled 'Existing Search Agents' and a 'Run Icon' (document with magnifying glass) next to it, also highlighted with a red box. Below the search agent section is the 'Search Results' table.

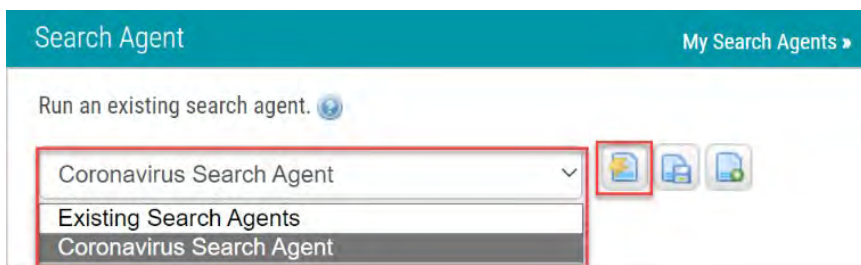
Score	GN Code	Grant Title	Agency	Actual Funds	Due Date	
100.00	US17632	Coronavirus Capital Projects Fund (CCPF) for Tribal Governments - FY 2022	US Treasury	\$100,000,000	10/14/2022	 
99.99	US16801	Coronavirus (COVID-19) Pandemic: Public Assistance Simplified Application - FY 2022	US DHS	Unspecified	07/01/2022	 
00.00	HS17147	Airport Coronavirus Response Grant Program	HS	\$2,985,774,605	06/30/2021	 

- 2) The **Create Search Agent** pop-up window will appear enter a **Name*** and select the *Send Search Agent Alert Email checkbox* to receive automatic alerts whenever the results are updated. Then click the *Save > button*  to proceed.



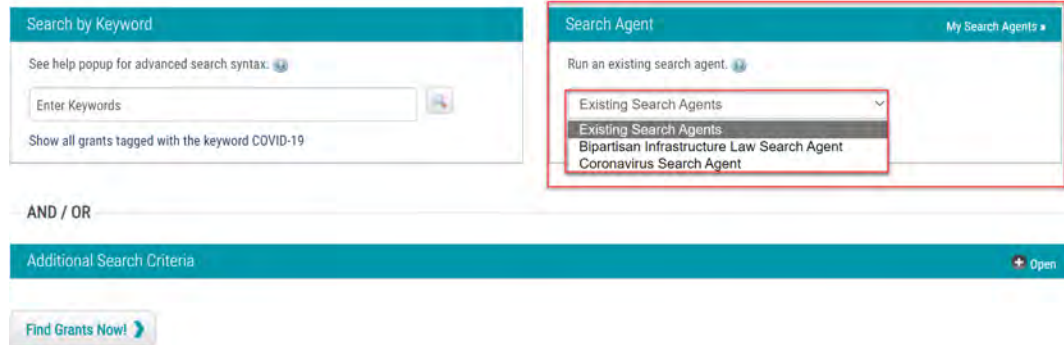
The screenshot shows the 'Create Search Agent' pop-up window. It has a title bar 'Create Search Agent' with a close button. Below the title bar is a message: 'A search agent will be created with the current search criteria.' There is a 'Name*' field containing 'Coronavirus Search Agent'. Below the name field is a checkbox labeled 'Send Search Agent Alert Email' which is checked. At the bottom of the window are two buttons: 'Save >' and 'Cancel >'.

- 3) The newly created Search Agent will now appear in the **Search Agent** dropdown menu to utilize in the future by clicking the *Run Icon* .



The screenshot shows the 'Search Agent' section of the eCivis interface. It has a title bar 'Search Agent' and a 'My Search Agents' link. Below the title bar is a message: 'Run an existing search agent.' There is a dropdown menu with the following options: 'Coronavirus Search Agent', 'Existing Search Agents', and 'Coronavirus Search Agent'. The 'Coronavirus Search Agent' option is highlighted. To the right of the dropdown menu are three icons: a document with a magnifying glass (Run icon), a document (Print icon), and a document with a magnifying glass (Run icon).

- a. Agency eCivis users can easily navigate to saved search agents in the future by clicking on the **Research Find Grants** button on the eCivis Homepage. Then the **Search Agent** section will appear with a dropdown menu of existing search agents.



- 4) If the Agency eCivis user would like to update the email preferences of the Search Agent Alert emails, click *My Preferences* under the **Administration** tab.



- a. In the **Email Preferences** section update the **Search Agent Email** preference to *Daily* or *Weekly*. Then click the *Save Preferences* button.

My Preferences

Take full advantage of Grants Network by setting your preferences below.

Display Preferences

Grant Listings per Page:

Email Preferences

New Grants / Updates Email: None Daily Weekly

Saved Grants Email: None Daily Weekly

Search Agent Email: Daily Weekly

Tasks Email: None Daily Weekly

Routed Grant Updates Email: Yes No

Appendix E – Application Preparation

eCivis Grants Network and SBA Required Fields and Sources

The following fields are required by either eCivis Grants Network or SBA and have specific data that is required to be entered into the fields as described.

eCivis Grants Network Data Field	Data to be Entered
Application Due Date:	Defaults to the eCivis Grants Network listed date. If the field is blank, the Agency eCivis user will need to enter the date.
Assigned To:	Defaults to the Project Lead but can be changed to any Project Team member.
Projected Awarded \$:	The award amount that the Indiana State Agency will request from the funder.
Match Required:	Defaulted by eCivis Grants Network dependent on the NOFO requirement.
If Yes, Match Type:	Cash, In-Kind, Cash/In-Kind
Cash Match \$:	The amount of cash the Indiana State Agency or others are providing for the grant match.
In-Kind Value:	The value of the non-cash contribution of goods and services by the Indiana State Agency or others for the grant match.
Grant Tags:	The tags selected in the earlier Stage of Under Consideration Stage will carry forward to Grant Awarded Stage. Agency eCivis user should review and make any necessary updates.
Notes:	Should include the budget period, the project period, the project period estimate (length of entire project and cumulative funded amount), any information regarding using the funding for a pass-through grant program, and/or any other information that should be shared with SBA and/or internally with the Project Team at this point.
Attach Files:	Required upload of SBA Federal Assistance Request Form along with any other pertinent documents if one or more of the following apply to the project and grant: Maintenance of Effort (MOE), Non-Cash/In-Kind Match/Third Party; and/or New FTE and/or Contractor Staff Needed.

Appendix F – Federal Assistance Request Form to eCivis Fields

SBA Federal Assistance Request Form – eCivis Grants Network

The following data elements remain as part of the SBA Federal Assistance Request Form (FARF) but are now collected in the eCivis Grants Network by various data fields and sources as indicated. The table follows the order of the FARF.

Data Element Source Definition:

- State system setup – SBA-created.
- User account setup – individual Agency eCivis user.
- eCivis Grants Network – grant management system-generated.
- User entry – individual Agency eCivis user input.
- User selection – individual Agency eCivis user selection of eCivis Grants Network-created data.

FARF Data Element	eCivis Grants Network Data Field	Data Element Source
State Agency	Department	State system setup
Business Unit	Department	State system setup
Agency POC	Project Lead	User account setup
Agency POC Email	Email	User account setup
Agency POC Phone	Phone	User account setup
Federal Funding Agency	Agency	eCivis Grants Network
Funding Opportunity Title	Grant Title	eCivis Grants Network
Funding Opportunity Number	Federal FON	eCivis Grants Network
Federal Statutory Authority	Stated on Grant tabs (Summary, Eligibility/ Application, Financial, and/or Contact/Files) or in the Notice of Funding Opportunity (NOFO) provided as a link on the Contact/Files tab.	eCivis Grants Network
Funding Type	Formula is indicated in the Grant Title.	eCivis Grants Network
	Pass-Through	User entry (Notes)
	Reimbursement or Advanced Payment	User selection (Grant Awarded Stage)
Deadlines	Application	eCivis Grants Network
	Form	User entry (Task creation)
	Report	
	Letter of Intent	
	Governor's Signature	
Project Period	Project Start Date and Project End Date	User entry (Project Options, Edit Project)

Budget Period (two places at different times)	Contract Start Date and Contract End Date	User entry (Notes)
	Contract Start Date and Contract End Date	User entry (Grant Awarded Stage)
Year of Project	Project Name	User entry
Match	Match Type: Cash, In-Kind, or Cash/In-Kind	User selection
	Cash Match	User entry
	In-Kind Value	User entry
Maintenance of Effort (MOE)	MOE – FORM UPLOAD REQUIRED	User selection (Grant Tags)
Budget Period Estimate	Projected Award \$	User entry
Project Period Estimate	Notes	User entry
Staff Needed	Staff Needed - New Contractor – FORM UPLOAD REQD	User selection (Grant Tags)
	Staff Needed – New FTE – FORM UPLOAD REQUIRED	User selection (Grant Tags)
Memorandum of Understanding (MOU)	MOU Executed – No	User selection (Grant Tags)
	MOU Executed – Yes – FORM UPLOAD REQD	User selection (Grant Tags)
Program & Project Synopsis	Project Summary	User entry

Appendix G – Application Submitted

eCivis Grants Network and SBA Required Fields and Sources

The following fields are required by either eCivis Grants Network or SBA and have specific data that is required to be entered into the fields as described.

eCivis Grants Network Data Field	Data to be Entered
App. Submitted:	Enter the date the application was submitted to the grantor/funder.
Completed By:	Defaults to the Project Lead but can be changed to any Project Team member.
Projected Awarded \$:	The award amount that the Indiana State Agency has requested from the grantor/funder as stated in its application.
Match Required:	Defaulted by eCivis Grants Network dependent on the NOFO requirement.
If Yes, Match Type:	Cash, In-Kind, Cash/In-Kind
Cash Match \$:	The amount of cash the Indiana State Agency or others are providing for the grant match.
In-Kind Value:	The value of the non-cash contribution of goods and services by the Indiana State Agency or others for the grant match.
Grant Tags:	The tags selected in the earlier Stages of Under Consideration Stage and Application Preparation Stage will carry forward to Application Submitted Stage. The Agency eCivis user should review and make any necessary updates.
Notes:	Should include project period estimate (length of entire project and cumulative funded amount), any information regarding using the funding for a pass-through grant program, and/or any other information that should be shared with SBA and/or internally with the Project Team at this point.
Attach Files:	Application submitted is required to be uploaded. An application is any form, report, data, or any other type of communication with a grantor/funder to receive assistance or to agree to allocations of assistance.

Appendix H – Updates to User Guide

August 12, 2024

- [Step 2: Save/Assign a Grant to a New Project](#) *modified*
- [Step 4: Updating Grant Status to Application Preparation](#) *modified*

- [Definitions](#) *moved prior to Appendixes*

- [Appendix A – Organization Funding](#) *moved*
- [Appendix B – Organization Funding: Multi-Years](#) *added*
- [Appendix C – Multi-Year Project Periods/Multi-Award Grants](#) *moved*
- [Appendix F – Federal Assistance Request Form to eCivis Fields](#) *updated*

- [Appendix H – Updates to User Guide](#) *added*