



State of Indiana eCivis Grants Network User Guide

Managing State-Funded Grants in eCivis

August 2024

Contents

Purpose	2
Section 1 – Create State-Funded Grant Organization Funding.....	2
Section 2 – Assign State-Funded Grant Organization Funding to a Project.....	5
Section 3 – Automatically Assigned Tasks	11
Section 4 – eCivis Project Budget	13
Conclusion	16
Definitions	16
Appendix A – State of Indiana Agencies, Acronyms, and BUs	21
Appendix B – Completing Pending Tasks	23

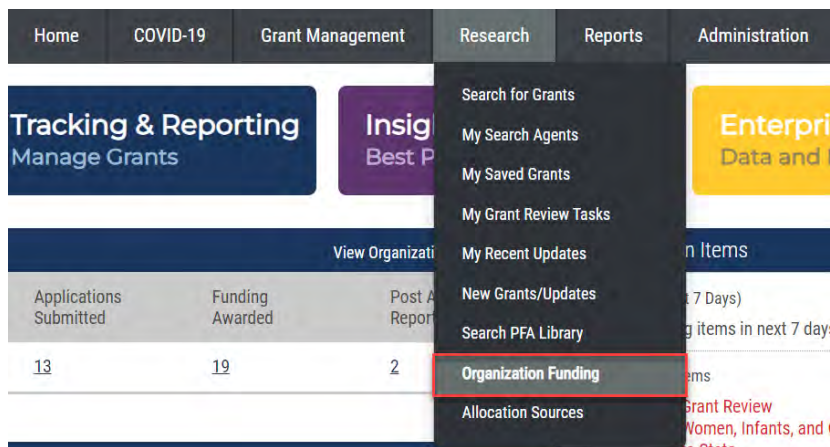
Purpose

The purpose of this user guide is to provide specific instructions to Indiana State Agencies managing state-funded grants in the eCivis Grants Network. These steps will guide Agency eCivis users to establish the funding mechanisms in eCivis to manage state-funded grants.

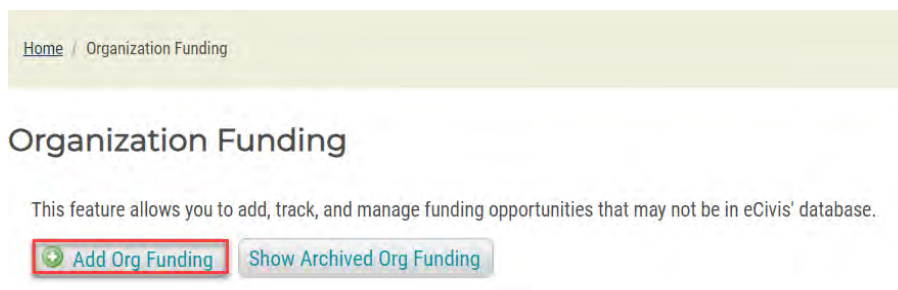
Section 1 – Create State-Funded Grant Organization Funding

Agencies that manage state-funded grants will create organization funding for each State Fund or Dedicated Fund.

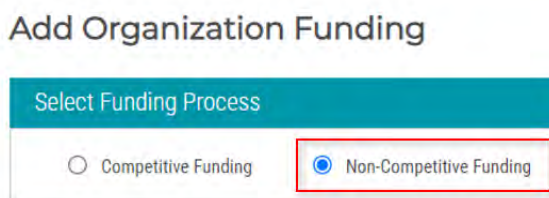
On the eCivis Grants Network homepage, the Agency eCivis user will hover over the **Research** tab and click on *Organization Funding*.



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



- 2) The Agency eCivis user will need to select whether the funding opportunity is competitive or non-competitive. **For state-funded grants, SBA requires that Agency eCivis users always select non-competitive.**



- 3) The Organization Funding's **Funding Title** will indicate the following:
- The **Funding Title** begins with the funding type: State Grant Fund.
 - The state agency that was appropriated the funding by using the naming convention in [Appendix A – State of Indiana Agencies, Acronyms, and BUs](#).
 - The name of the State or Dedicated Fund for the program.
 - Include the State or Dedicated Fund Number in parentheses.
 - The SFY included at the end of the title to indicate in which state fiscal year the funding is available for the state agency's usage. Use two digits to represent the year.
 - Title Format: State Grant Fund - Agency Acronym - Agency BU - State or Dedicated Fund Name (Fund Number) - SFY##**
 - For example, DNR was appropriated funding in the state budget for NextLevel Trails grants. DNR would create organization funding for the state appropriation with a **Funding Title** like the one below:

State Grant Fund - IN DNR - 300 - NextLevel Trails (12345) - SFY24

ORG0082 State Grant Fund - IN DNR - 300 - NextLevel Trails (12345) - SFY24

Summary	Eligibility/Application	Financial	Contact/Files
Type:	State	Next Due:	N/A
Agency:	IN Department of Alpha	Match Required:	No
		Actual Funds:	\$750,000

- 4) For **Funding Type**, “State” will be selected. **Agency** is the name of State Agency issuing the State-Funded Grant.

Funding Identification

Funding Title *
 150 Characters Left

Fiscal Year *

Funding Type *
 County/Regional
 Federal
 Foundation
 Other
State
 Tribal

Agency *

Office:
 700 Characters Left

- 5) The **Office**, **FAIN**, **CFDA/ ALN Number**, **Organization ID**, and **Grant Contact** fields are not required and can be left blank.
- In the **Total Funds** field, the Agency eCivis user will enter the amount available under the state budget bill appropriation that funds the state grant program.

- The Agency will answer “No” to the **Matching Required** field, which will remove the **Match Type** field.

- 6) 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 opportunity. Multiple categories can be selected if needed, but only one is required.
- Lastly, for the **Eligibility** section, the Agency eCivis user will select all that apply to the particular State-Funded Grant.


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	

The **Attachments** field allows Agency eCivis users to provide a website link, and/or upload document(s), related to creating the funding opportunity. Although this section is not required by eCivis Grants Network, SBA requires it to verify the data elements entered. Therefore, each State-Funded Grant is required to provide one of the following:

- Website or page detailing the nature of the state grant.
- Relevant sections of the Indiana state budget bill within which the grant's state funding was appropriated.

Attachments	
Reference URL:	<input type="text"/>
Enter the granting agency's website for future reference. For example, http://...	
Attach Files:	<input type="file"/>

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

Section 2 – Assign State-Funded Grant Organization Funding to a Project


In the same way a federal grant must be assigned to an eCivis Project, State-Funded Grants must also be assigned an eCivis Project to be available for Grantor solicitations. There should only be one eCivis Organization Funding per each State General or Dedicated Fund in PeopleSoft Financials. If there is more than one grant program funded by the State Fund or Dedicated Fund, a new eCivis Project will be assigned for each

program (indicated by the Program Number in the eCivis Project title, as described below).

1) From the Organization Funding homepage, 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
ORG0082	State Grant Fund - IN DNR - 300 - NextLevel Trails (12345) - SFY24	2024	Non-Competitive	\$750,000	N/A	    

- 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
ORG0082	State Grant Fund - IN DNR - 300 - NextLevel Trails (12345) - SFY24	2024	Non-Competitive	\$750,000	N/A	    

ORG0082 State Grant Fund - IN DNR - 300 - NextLevel Trails (12345) - SFY24





Summary	Eligibility/Application	Financial	Contact/Files
Type:	State	Next Due:	N/A
Agency:	IN Department of Alpha	Match Required:	No
		Actual Funds:	\$750,000

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:


Assign grant to an existing project
 Assign grant to a new project
 Save as unassigned

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.

- 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 with the following changes:**

- Remove the prefix eCivis identifier or **ORG Code**, e.g., ORG00082 has been removed from the **Project*** below by simply copying and pasting the **Grant** field without the leading **GN Code** into the **Project*** field.
- Add a dash and the 5-digit Program Number after the Fund Number.
- **eCivis Project Title:** State Grant Fund - IN DNR - 300 - State or Dedicated Fund Name (12345-10000) - SFY24

- 5) Select the **Project Lead*** from the drop-down menu. The **Project Lead** is the Agency eCivis user responsible for managing the State-Funded Grant. 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.
- 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.
 - 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 *: Department 1

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

Project Lead *: Agency eCivis User

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

Assign Grant to New Project

Project Lead *: Select Project Lead

Project Type *: Non-Construction Construction

- 7) The **Internal Project ID** and **Internal Project Name** fields are reserved for SBA use. The Agency eCivis user will leave these fields blank.

Assign Grant to New Project

Project Lead *: Select Project Lead

Project Type *: Non-Construction Construction

Internal Project ID: [Empty Field]

Internal Project Name: [Empty Field]

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

Project Summary *: [Empty Text Box]

1500 Characters Left

- 9) In the second section, **2. Select Funding Status**, the Agency eCivis user will need to answer **Is an application required for this grant?** For State-Funded Grants, the Agency eCivis user will always select *No*.

- 10) In the third section, **3. Select Grant Status**, the Agency eCivis user will select Grant Awarded for all State-Funded Grants.

2. Select Funding Status

Is an application required for this grant?*: Yes No

3. Select Grant Status

Grant Status*:

Select Grant Status

Select Grant Status
Under Consideration
Award Projected
Grant Awarded

Save Cancel

- 11) 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. Leave these fields blank.

4. Complete Status Form

Internal Grant ID:

Internal Grant Name:

Grant Tags*: All Organization Tags Selected Organization Tags

- 12) **Grant Tags*** are a required field. For State-Funded Grants, move only the **1 - Not Applicable** tag to the right under Selected Organization Tags.

4. Complete Status Form

Internal Grant ID:

Internal Grant Name:


Grant Tags*: All Organization Tags Selected Organization Tags

2 - Maintenance of Effort - UPLOAD FORM
3 - Third Party Match - UPLOAD FORM
4 - MOU - UPLOAD FORM or MOU

1 - Not Applicable

- 13) **Notes** are not required for State-Funded Grants.


- 14) **Attach Files.** The Agency eCivis user can attach any supporting documentation.

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

Upload Files

Attach Files:

Save Cancel

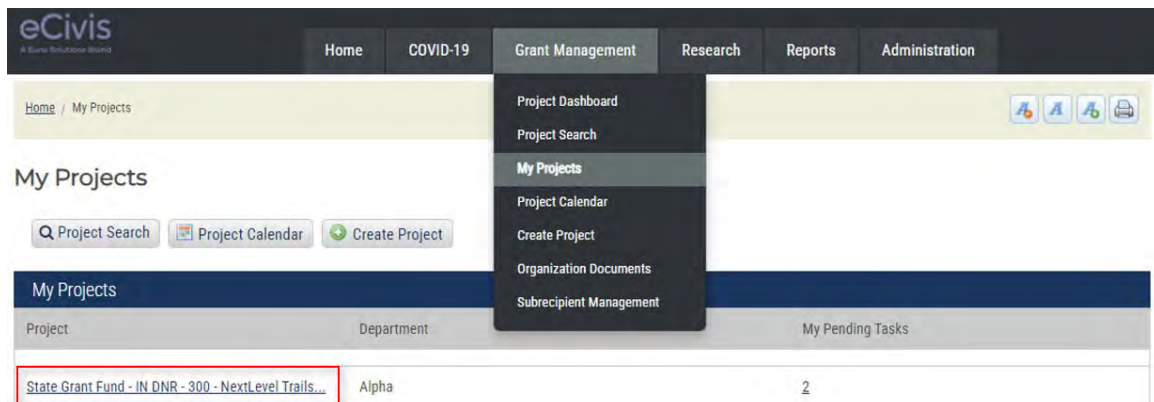
15) Upon clicking the *Save > button* , the Agency eCivis user is taken back to the **Grant Details** page. The Agency eCivis user has two options to navigate to the newly created eCivis Project:

- 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. If there are multiple projects, all projects will be listed in this display.

ORG0082 State Grant Fund - IN DNR - 300 - NextLevel Trails (12345) - SFY24







- 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.






Section 3 – Automatically Assigned Tasks

- 1) The State-Funded Grant eCivis Project will have two automatic tasks on the **Project Dashboard** in the **Pending Tasks** section.
 - a. **Task Name:** Rqst Approval: 1- SBA Analyst - FS/Match/Subgrant - [Agency Acronym]
 - **Required Action:** This task can be deleted.
 - To do so, click on the task name & select the *Delete button*.
 - b. **Task Name:** Rqst Approval: 2- SBA Finance - FS (Funding Source)
 - **Required Action:** In the Notes section of this task, submit the State Fund or Dedicated Fund code and Program code for this project.




Pending Tasks		Completed Tasks	Approval History					
Task Name i	Grant	Stage	Assigned To	Due	Reminder	File(s)	Done	
 Rqst Approval: 1. SBA Analyst - FS/...	ORG0125: FY2025	Grant Awarded	C. Schnick	08/13/2024		 	<input type="checkbox"/>	
 Rqst Approval: 2. SBA Finance - FS ...	ORG0125: FY2025	Grant Awarded	C. Schnick	08/13/2024		 	<input type="checkbox"/>	

- 2) Both tasks will be assigned to the **Project Lead** to complete or delete, as identified above, and a checkbox appears under the **Done** column in the **Pending Tasks** section. If these tasks need to be reassigned to another **Project Team** member to complete, please see [Appendix B – Completing Pending Tasks](#).
- 3) To complete the task, the Agency eCivis user will click the *Done checkbox* next to the first task titled **Rqst Approval: 2- SBA Finance - FS (Funding Source)**.

Pending Tasks		Completed Tasks	Approval History					
Task Name i	Grant	Stage	Assigned To	Due	Reminder	File(s)	Done	
 Rqst Approval: 2. SBA Finance - FS ...	ORG0125: FY2025	Grant Awarded	C. Schnick	08/13/2024		 	<input type="checkbox"/>	

- 4) The **Approval Request Form** will appear. Additional guidance is on the next page.

Enter the *Approval Due** date and click the *Save > button*  to complete the task.



- a. **Attachments:** This is not required. If the Agency eCivis user has supporting documentation, those files can be uploaded by clicking the *Add Files Icon* .
- b. **Approval Due*:** Click the *Calendar Icon*  to set a preferred date.
- c. **Reminder:** Click the *Calendar Icon*  to set a reminder date for SBA.
- d. **Notes to Approver:** Use this textbox to enter the State or Dedicated Fund Number and the Program Number for this project.

Approval Request Form

Project: State Grant Fund - IN DNR - 300 - NextLevel Trails (12345-10000) - SFY24


Grant: ORG0082 State Grant Fund - IN DNR - 300 - NextLevel Trails (12345) - SFY24



Task: Rqst Approval: 2- SBA Finance - FS (Funding Source)




Attachments : **a.** 

Description: Federal Funding Source: Upload award notice/agreement, Terms and Conditions, and Funding Source Request Form. The request form can be added to this task.

Approver: SBA Finance

Approval Due*: **b.** 

Reminder:  **c.** 

Files to Forward :  Funding_Source_request_form_2023 (68.5 Kb)
  Subgrant_Request (MOU) 2023 (62.5 Kb)

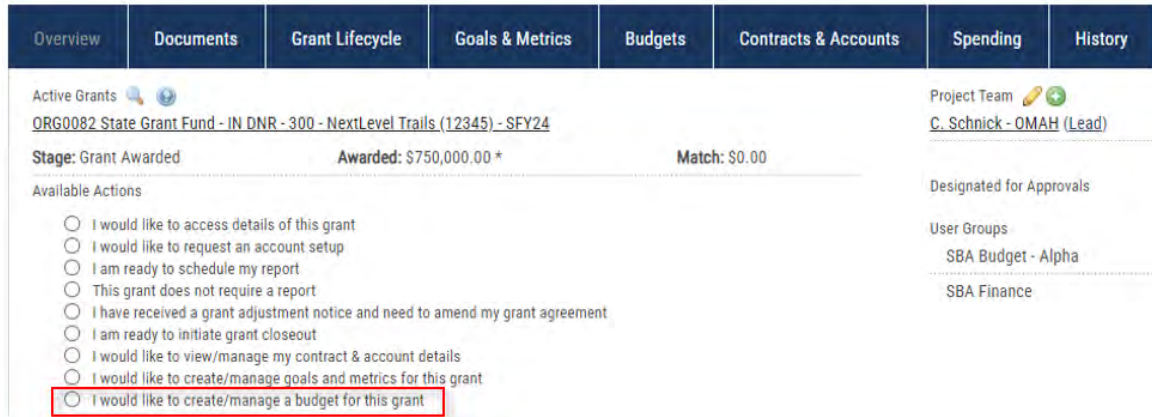
Notes to Approver: **d.**
952 Characters Left

Section 4 – eCivis Project Budget

Creating a grant budget within the State-Funded Grant eCivis Project will allow expenses from PeopleSoft Financials to be tracked within eCivis.

NOTE: This process utilizes a zero-dollar budget, so transactions that occur in PeopleSoft Financials will appear as a negative amount within this budget.

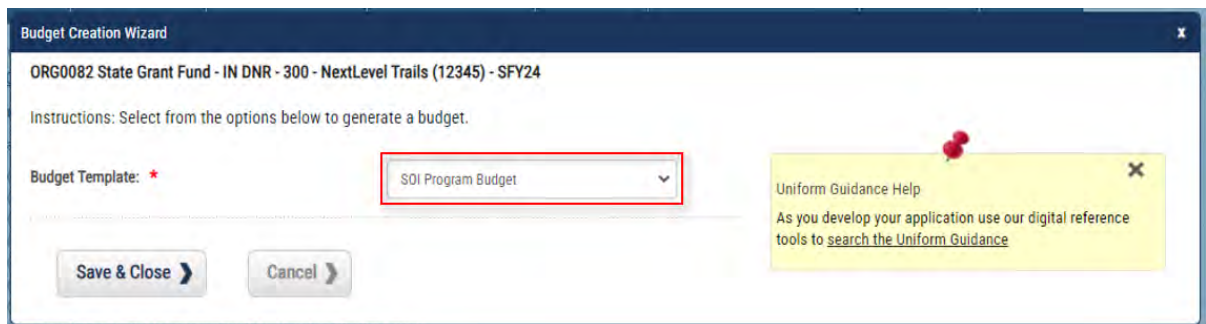
- 1) From the State-Funded Grant eCivis Project Dashboard, under **Available Actions** select “*I would like to create/manage a budget for this grant*”.



The screenshot shows the 'Available Actions' section of the eCivis Project Dashboard. The list of actions includes:

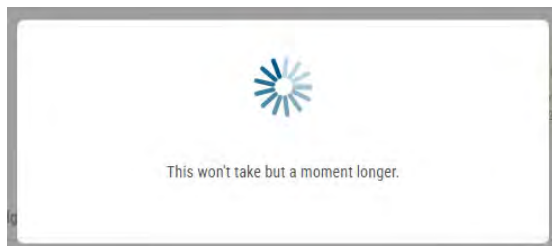
- I would like to access details of this grant
- I would like to request an account setup
- I am ready to schedule my report
- This grant does not require a report
- I have received a grant adjustment notice and need to amend my grant agreement
- I am ready to initiate grant closeout
- I would like to view/manage my contract & account details
- I would like to create/manage goals and metrics for this grant
- I would like to create/manage a budget for this grant**

- 2) In the **Budget Creation Wizard**, select the “SOI Program Budget” **Budget Template***



The screenshot shows the 'Budget Creation Wizard' dialog box. The 'Budget Template' dropdown menu is set to 'SOI Program Budget' and is highlighted with a red box. The dialog box also contains a 'Save & Close' button and a 'Cancel' button. A yellow help box is visible on the right side of the dialog box.

- 3) Click the *Save & Close* > button . This will initiate a brief processing time.




4) The eCivis Project's new budget template will open.

5) Below the **Budget Settings** and **Budget Summary** sections is a list of **Budget Items**. Scroll to **7. Grant Program/Grant Agreement(s)** & click the **+Open** button .

6) Click into the cell below **GL Code** and type *E57000*. This is a critical step as it provides the match to expenditures in PeopleSoft Financials.

Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Item Type
Grant Program/Grant Agreement(s)	Grant Program/Grant Agreement(s)	0.00	\$0.00	\$0.00	\$0.00	E57000	Direct Cost





- 7) The budget template has been initiated. Scroll back up to the Budget Settings section. Select the gray *Save Changes* button  to confirm the E57000 GL Code addition.


Budget Settings

Indirect Costs 0.00 %

Match / Cost Share 0.00 % \$ 0.00

Budget Stage

Actions    

- 8) A Budget Notes pop-up will allow the Agency eCivis user to input notes, if desired. Click the *green Save* button  to return back to the budget.

Budget Notes

Revisions:

- Budget Created by C. Schnick - OMAH on 03-14-24 12:31 PM
- Grant Awarded by C. Schnick - OMAH on 03-14-24 12:31 PM

New Note:

Added E57000 GL Code.

979 characters remaining.





- 9) Select the red *"I am ready to lock this budget"* padlock button  to lock the budget.

Budget Settings

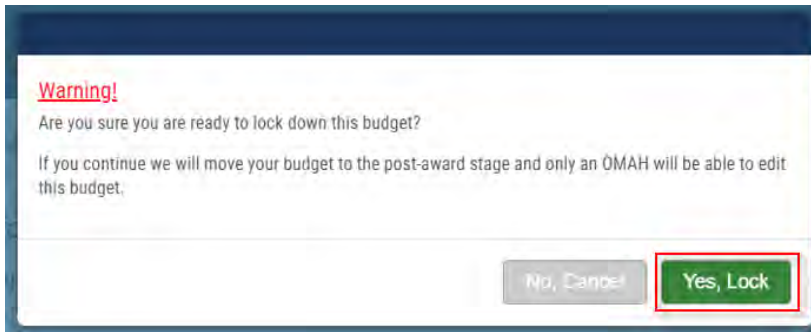
Indirect Costs 0.00 %


Match / Cost Share 0.00 % \$ 0.00

Budget Stage

Actions    

- 10) Select the *"Yes, Lock"* button  in response to the Warning pop-up notification. This ensures it remains a zero-dollar budget and cannot be updated by the Project Team.



11) A “(This budget is locked)” notation will appear underneath Budget Settings. Actions will be reduced to an “Unlock budget” open padlock icon .

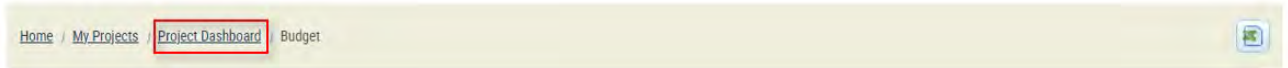
Post-Award Budget for

ORG0082 State Grant Fund - IN DNR - 300 - NextLevel Trails (12345) - SFY24

Revision Report

Budget Settings	Budget Summary			
(This budget is locked)	Current Month Expenditure	\$0.00	\$0.00	Total Direct Costs
Report Column: Current Month	Total Expenditure to Date	\$0.00	\$0.00	Total Indirect Costs
From: []	Total Available Balance	\$0.00	\$0.00	Total Awarded
To: []	Percent Expenditure	0.00%	\$0.00	Match / Cost Share
Generate Report	Revenue	\$0.00	\$0.00	Program Income
Budget Stage: Post-Award				
Actions:				

12) Select the “Project Dashboard” hyperlink above the Budget to leave the page.



Conclusion

At this point, the Agency eCivis user has set up the State-Funded Grant in eCivis Grants Network and is ready to make grant awards. For guidance on making grant awards of State-Funded Grants, please review the Grantor user guides, starting with [State of Indiana eCivis User Guide - Grantor 1. Creating a Solicitation](#).

Once the term of the grant has ended and the objectives of the grant have been met, the Agency eCivis user should review the [State of Indiana eCivis Grants Network User Guide: Grant Closeout in eCivis and PeopleSoft](#) for instructions on how to close out their grant in eCivis Grants Network and in PeopleSoft Financials.

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.

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

Budget – The financial information Applicants are required to submit to the Funder or Grantor detailing how they will spend grant funds, if awarded. This budget is carried over to the awarded grant so that the Grantee or State Grant Recipient 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.

Competitive Funding – Funding where the Grantor may select the Grantee(s) from among 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 – Departments built within eCivis Grants Network. A single Indiana State Agency may have one or more departments within eCivis Grants Network representing their divisions, offices, agencies, etc.

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

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

Fund Number – PeopleSoft Financials chartfield used for tracking and relating specific sources and uses of revenues or budget authority.

Funder – See Grantor.

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

Grant Agreement – See Agreement.

Grant Award – An award provided by a Pass-Through Entity to a State Grant Recipient to conduct part of a State award received by the Pass-Through Entity.

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 to consider if it will apply for the grant.
- 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 submitted an application to the grant program.
- 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 – Also referred to as Organization Tags. They are a tool used in eCivis Grants Network to help further identify and organize projects and grants.

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

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

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

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

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 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.

Pass-Through Entity – The non-Federal entity that provides a grant award to a State Grant Recipient to conduct part of a program.

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

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

Post-Award Grantee – A stage in the lifecycle of a grant after the Indiana State Agency has accepted the award. Components of the post-award process include financial reporting, activity reporting, Subrecipient or State Grant Recipient management, and closeout. See Pre-Award and Pre-Award Grantee definitions too.

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

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

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

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

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

Program Number – PeopleSoft Financials chartfield classification of an activity according to its purpose or objective.

Project – See Grantee Project.

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

Project Period – See Period of Performance.

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

State-Funded Grant – A grant: 1) awarded by an Indiana State Agency, and 2) funded by a State Fund or a Dedicated Fund.

State Grant Recipient – An entity that receives a State-Funded grant from an Indiana State Agency utilizing eCivis Grants Network.

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) approval or financial reports with/without payment/reimbursement requests from State Grant Recipients.

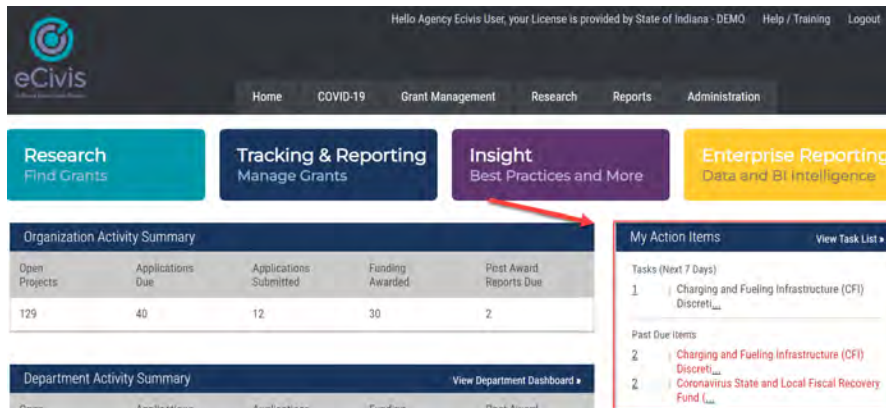
Appendix A – State of Indiana Agencies, Acronyms, and BUs

State of Indiana Agency Naming Conventions	Acronym	Business Unit (BU)
IN Adjutant General	AGO	110
IN Alcohol and Tobacco Commission	ATC	230
IN Archives and Records Administration	IARA	062
IN Arts Commission	IAC	705
IN Attorney General	ATG	046
IN Board of Animal Health	BOAH	351
IN Bureau of Motor Vehicles	BMV	235
IN Civil Rights Commission	CRC	258
IN Commission for Higher Education	CHE	719
IN Criminal Justice Institute	CJI	032
IN Department of Agriculture	ISDA	036
IN Department of Child Services	DCS	502
IN Department of Correction	DOC	615
IN Department of Education	DOE	700
IN Department of Environmental Management	IDEM	495
IN Department of Health	IDOH	400
IN Department of Homeland Security	DHS	385
IN Department of Insurance	IDOI	210
IN Department of Labor	DOL	225
IN Department of Natural Resources	DNR	300
IN Department of Toxicology	IDT	115
IN Department of Transportation	INDOT	800
IN Department of Veterans Affairs	DVA	160
IN Department of Workforce Development	DWD	510
IN Destination Development Corporation	IDDC	037
IN Economic Development Corporation	IEDC	260
IN Family and Social Services Administration	FSSA	405, 410, 497, 498, 500, 501, 503
IN Governor's Council for People with Disabilities	GCPD	035
IN Governor's Workforce Council	GWC	512
IN Indiana Disability Rights	IDR	044
IN Integrated Public Safety Commission	IPSC	286


State of Indiana Agency Naming Conventions	Acronym	Business Unit (BU)
IN Law Enforcement Training Board	LETB	103
IN Lieutenant Governor's Office	LG	038
IN Management Performance Hub	MPH	060
IN Office of Community & Rural Affairs	OCRA	038
IN Office of Energy Development	OED	266
IN Office of Management and Budget	OMB	055
IN Professional Licensing Agency	PLA	250
IN Prosecuting Attorneys Council	PAC	039
IN Protection and Advocacy Services Commission	PASC	044
IN Public Defender Council	PDC	610
IN School for the Blind and Visually Impaired	SBVI	550
IN School for the Deaf	SD	560
IN Secretary of State	SOS	040
IN State Budget Agency	SBA	057
IN State Library	ISL	730
IN State Police	ISP	100
IN Supreme Court	OJA	022
IN Utility Regulatory Commission	IURC	200
IN Veterans' Home	VH	570

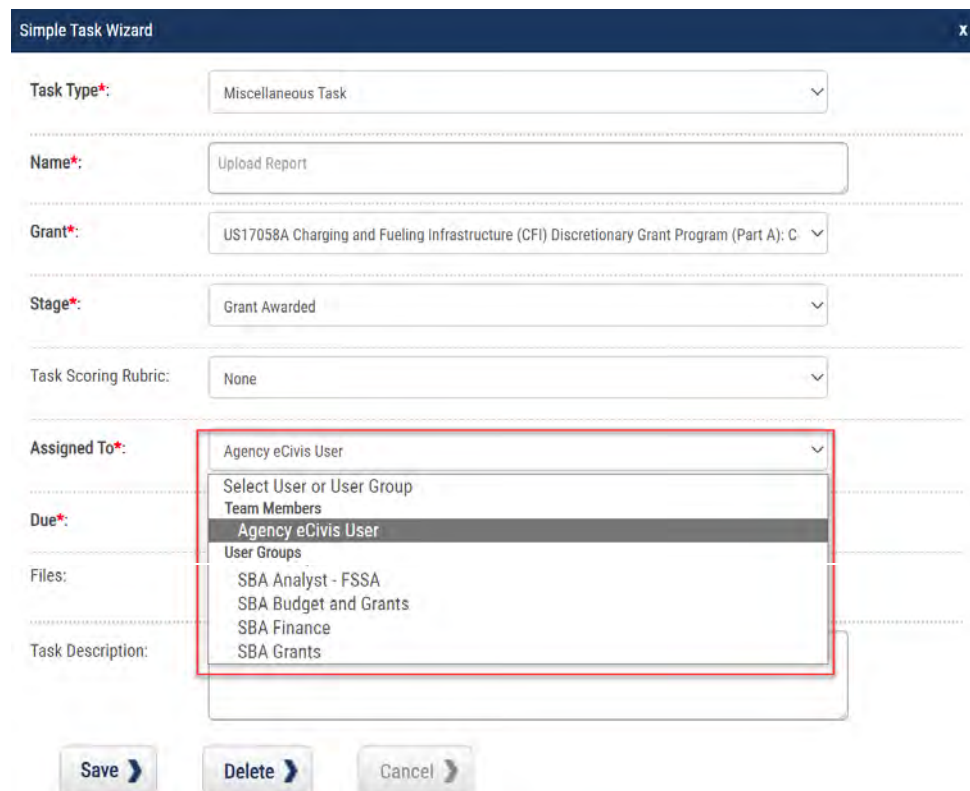
Appendix B – Completing Pending Tasks

- 1) On the eCivis Grants Network homepage, the Agency eCivis user will see their pending tasks in the **My Action Items** section. Click on the Tasks number link which represents the number of tasks assigned to the Agency eCivis for the stated **Project Name**. This will navigate the Agency eCivis user to the **Project Dashboard** page of the selected Tasks number/**Project Name**.



The screenshot shows the eCivis Grants Network homepage. At the top, there is a navigation bar with links for Home, COVID-19, Grant Management, Research, Reports, and Administration. Below this are four main sections: Research (Find Grants), Tracking & Reporting (Manage Grants), Insight (Best Practices and More), and Enterprise Reporting (Data and BI Intelligence). The 'Insight' section is highlighted with a red arrow. Below the main sections are two summary tables: 'Organization Activity Summary' and 'Department Activity Summary'. The 'My Action Items' section is visible on the right, showing a list of tasks with a 'View Task List' link. The tasks listed are: 1. Charging and Fueling Infrastructure (CFI) Discreti... and 2. Charging and Fueling Infrastructure (CFI) Discreti... and Coronavirus State and Local Fiscal Recovery Fund L...

- 2) On the **Project Dashboard** page, the **Pending Tasks** section will display all the tasks that are waiting to be completed. The **Assigned to** column will show the specific team member's name responsible for completing the task.
 - a. If the task must be re-assigned, click on the specific *Task Name* to open the **Simple/Advanced Task Wizard**, update the **Assigned To** field, and click the **Save > button**  once updated.



The screenshot shows the 'Simple Task Wizard' form. The fields are: Task Type* (Miscellaneous Task), Name* (Upload Report), Grant* (US17058A Charging and Fueling Infrastructure (CFI) Discretionary Grant Program (Part A): C), Stage* (Grant Awarded), Task Scoring Rubric (None), Assigned To* (Agency eCivis User), Due* (empty), Files (empty), and Task Description (empty). The 'Assigned To*' dropdown menu is open, showing a list of users and user groups. The 'Agency eCivis User' is highlighted. At the bottom, there are three buttons: Save >, Delete >, and Cancel >.

- 3) Once the task is assigned to the appropriate Agency eCivis user, that Agency eCivis user will click the *Done* checkbox to complete the task.

Pending Tasks		Completed Tasks		Approval History			
Task Name	Grant	Stage	Assigned To	Due	Reminder	File(s)	Done
Rqst Approval: SBA Budget and Grant...	US17341: FY2021	Grant Awarded	A. User	08/31/2023			<input type="checkbox"/>
Rqst Approval: SBA Finance - Fundin...	US17341: FY2021	Grant Awarded	A. User	08/31/2023			<input type="checkbox"/>
Upload Report	US17341: FY2021	Grant Awarded	A. User	08/31/2023			<input type="checkbox"/>

NOTE: Only the **Assigned to** Agency eCivis user will see the *checkbox* under the *Done* column. Otherwise, it will be blank for all other **Project Team** members.

- 4) The **Task Completion** form will appear and will vary based on the type of task.
- Completed By*** is the **Project Team** member who completed the task. This will default to the **Project Team** member that is assigned the task.
 - Completion Date*** defaults to the date the task is being saved and should be left alone.
 - Attach Files** field allows Agency eCivis users to add any relevant documentation to support the task.
 - Notes** provides 1000 characters to provide any notes to support the task.
- 5) Once completed, click the *Save > button*

Task Completion

Charging and Fueling Infrastructure (CFI) Discretionary Grant Program

Task: Upload Report

Completed By *:

Completion Date *:

Attach Files:

Notes:
1000 Characters Left