SFB BRG eCivis User Guide

Post-Award Manual

Contents

Award Notification and Acceptance

Locating your award

1. After an award has been made, your application status will change to *Awarded* on your Portal homepage:

2. Your awards can also be viewed in the *My Awards* tab:

Award Notifications

1. If you have been selected to receive an award, you will be notified by email. The email will also have a PDF version of the award notification for your records:

Award Notification Letter

Dear Ulysses Grant,

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

Project:	HIV Testing Project
Program:	HOPWA FY2019
Approval Date:	06/13/2019
Approved Amount:	$800,000.00
Federal Awards:	• ORG0012 HOPWA FY19: $782,000.00

2. Click on the link to Portal at the bottom of the email notification:

Please find your award notification attached. To see full award details and accept your award, please click here.

3. Log into Portal and click on the appropriate Award title, or from the Actions column, select *Accept/Decline Award*:

My Awards

Show 10 ▼ entries   Search: [_____]

Grant Title	Award Status	Notification Date	Performance Period	Open Tasks	Actions
Electric Bus Fleet Implementation	Awarded	01/27/2019	1/1/19 - 1/1/20	0	≡
HOPWA FY2019	Awarded	06/13/2019	6/30/19 - 6/30/20	0	≡
Workforce Development Program (WDP) Grant - FY 2019	Pending Acceptance		7/3/19 - 7/3/21	0	≡

Showing 1 to 3 of 3 entries   Accept/Decline Award ❯

4. From the following page, download any files from the Actions column. Then, click *Continue*:

Award Files

Show 10 ▼ entries   Search: [_____]

File Name	File Size	Actions
	No files are available for download	

Showing 0 to 0 of 0 entries   Previous   Next

Continue   Decline Award   Back

5. If you need to attach files to accept the award, select Upload Files on the following page:

Please upload any files necessary to finalize your award approval. This may include signed agreements, tax forms, and other files provided by the grantor.

Upload File ☁

Award Files

6. Files can be attached by selecting them from your File Explorer or dragging and dropping files from your File Explorer to the browser:

Select files for your award approval.

Drag files here or click to select & upload.

Done

7. Any uploaded file can be downloaded again, or deleted using the trash icon:

Show 10 entries   Search:

File Name	File Size	Actions
Award Notice Place Holder.docx	11.0 KB	☁ 🗑

Showing 1 to 1 of 1 entries   Previous 1 Next

8. Select *Finalize and Submit* to send the Program Administrator notification that you have accepted the award. You can also leave an optional note to the grantor and Program Administrator:

File Name	File Size	Actions
Award Notice Place Holder.docx	11.0 KB	☁ 🗑

Showing 1 to 1 of 1 entries   Previous 1 Next
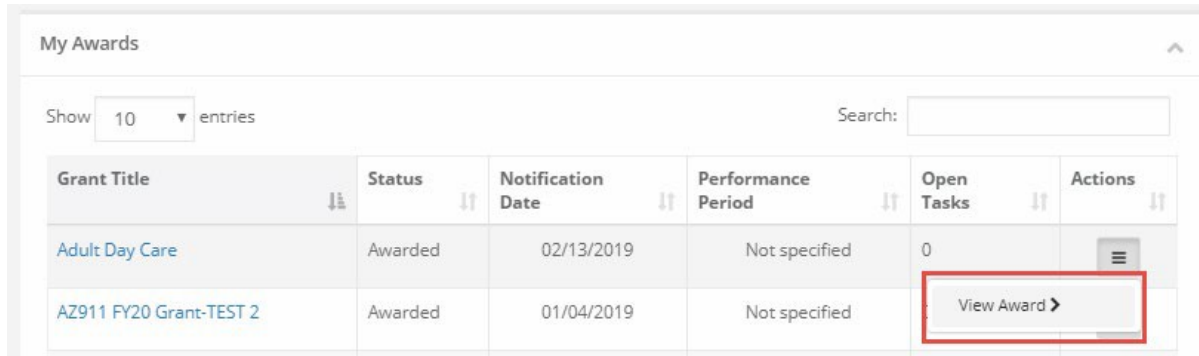
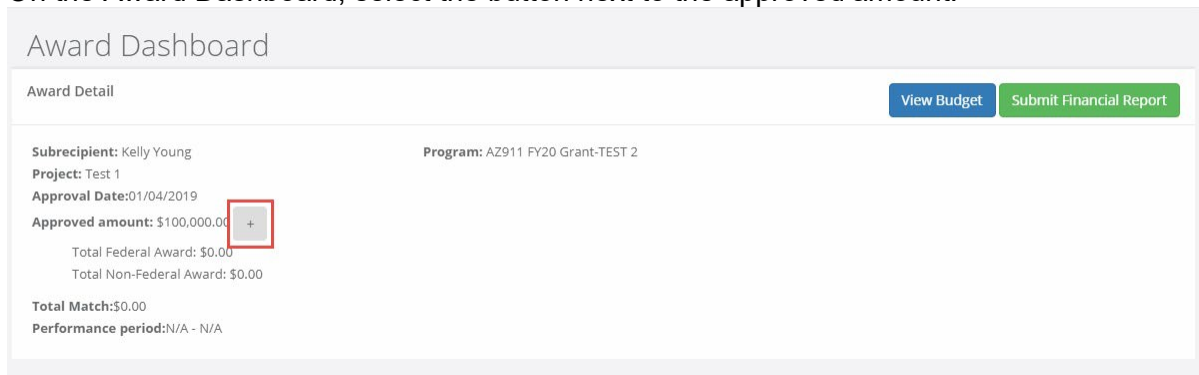Save   Finalize and Submit   Decline Award   Back

Viewing your award and the Award Dashboard

1. To view the award details, go to the My Awards tab and click on the button underneath the Actions column. Select *View Award*:

2. On the Award Dashboard, select the button next to the approved amount:

3. You can view information such as funding sources and how your project is being funded:

View your budget

1. If you submitted a budget with your application, it will be attached to the award. Click on *View Budget* to view your submitted budget:

2. You can export the budget form to Excel:

3. Click on the Budget Items to view a more detailed budget and the total cost per category:

Budget Items

1. Personnel

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

	Ext Cost	Direct Cost	Ind Cost	Cost Share
2. Fringe Benefits	$0.00	$0.00	$0.00	$0.00

4. You can enter budget information and details at the bottom of the page, under Budget Narrative. Click *Save* when you have completed this information.

Budget Narrative

Enter your budget narrative below.

</> | H1 | H2 | H3 | B | I | U | ☰ | ☰ | ☰ | ☰ | %

8000 characters rema

Project Team Members

Adding a team member to your grant award

1. The project official (the individual who submitted the grant) may add team members to their awarded grant in eCivis. All team members will have the same level of access to view and submit reports to the Grantor.

2. Sign into Portal and click on *My Awards*:

3. Click on the project you would like to add a team member to:

4. Select *Manage Project Team*:

5. Click on *Add Team Member*:

6. Enter the team member's email address, then click *Add Member*. One team member can be added at a time:

7. Once the email is sent, the individuals status will display as "Pending":

8. You can resend the invitation, or remove their access to the award from the Actions column:

9. Once the individual accepts the invitation, the team member's status will display as "Accepted":

Joining a grant award as a team member

1. If you have been invited to a grant project team to manage an award, you will receive an email. Click on the link in the email:
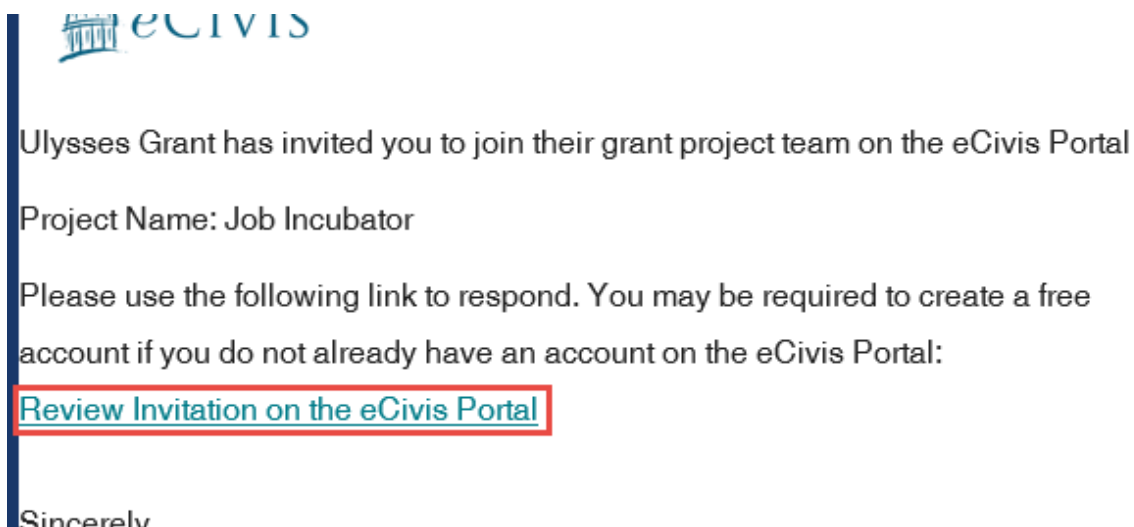
2. If you did not receive the email, notify the person overseeing the award. They can resend an invitation and check that the email was spelled correctly.

   2.a. **NOTE:** If you **HAVE NOT** previously set up an eCivis Portal account, you MUST click on the link, create an account, verify your account, and then go back to this link within the email. Otherwise, you will not be able to join as a team member.

3. Log into Portal and click *"accept invitation"*:

Project Team Invitation

Invitation Detail

You have been invited to join the project team for **Job Incubator** by Ulysses Grant

[Accept Invitation] [Reject Invitation]

4. Click *"OK"*:

Are you sure you want to accept this invitation?   ✕
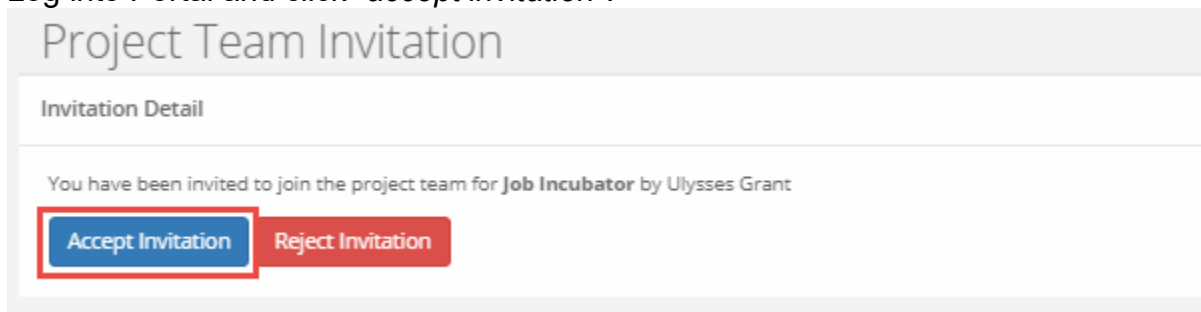
Cancel   [OK]
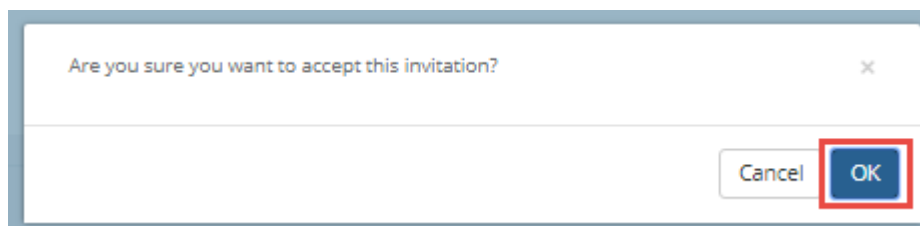
5. You will be taken back to the My Awards page. Note in the Role column, you are listed as a team member:

Search: work

	Award Status	Notification Date	Performance Period	Role	Actions
	Awarded	07/09/2019	7/3/19 - 7/3/21	Team Member	≡

Previous 1 Next

6. Select *Manage Award* from the Actions column to get started:

tion Date	Performance Period	Role	Actions
07/09/2019	7/3/19 - 7/3/21	Team Member	≡

Manage Award >   Next

Submitting Financial Reports

1. *From the Award Dashboard, you can submit a Financial Report directly to the Program Officer. Click on Submit Financial Report:*

Award Dashboard

Award Detail   View Budget   Submit Financial Report

Subrecipient: Kelly Young   Program: AZ911 FY20 Grant-TEST 2
Project: Test 1
Approval Date:01/04/2019
Approved amount: $100,000.00   +
          Total Federal Award: $0.00
          Total Non-Federal Award: $0.00
Total Match:$0.00
Performance period:N/A - N/A

2. The Award Detail provides a summary of the award information:

Award Detail   Back to Award Detail

AZ911 FY20 Grant-TEST 2 Awarded
Awarded by: Arizona Sub Recipient Portal
Approved amount: $100,000.00
Match type:
Cash match: $0.00
In-Kind match: $0.00
Performance period: N/A

3. The Award Financial Overview is not editable, but will update itself depending on the amounts that are submitted in the Financial Report Details. This area is a summary of the total award spent and the total award amount remaining.

Award Financial Overview   ^

This overview will update in real time as you complete your financial request. The data here reflects all submitted spending reports, even those still in the approval process.

	Spend	Match	Spend + Match
Award Total Spend	$ 0.00	$ 0.00	$ 0.00
	0.00 %	0.00 %	
Award Remaining	$ 100,000.00	$ 0.00	$ 100,000.00

4. In the Financial Report Details, click inside the Reporting Period text box and provide the dates of the reporting period then click *Apply*:

Financial Report Details

Reporting Period: *

07/01/2019 - 08/24/2019

📅 07/01/2019   📅 08/24/2019   Apply   Cancel

‹		Jul 2019							Aug 2019				›
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
30	1	2	3	4	5	6	28	29	30	31	1	2	3
7	8	9	10	11	12	13	4	5	6	7	8	9	10
14	15	16	17	18	19	20	11	12	13	14	15	16	17
21	22	23	24	25	26	27	18	19	20	21	22	23	24
28	29	30	31	1	2	3	25	26	27	28	29	30	31
4	5	6	7	8	9	10	1	2	3	4	5	6	7

5. Enter the amounts in the appropriate category under the *Spend+Match* columns. Spend is the amount of grant funds spent. Match is the amount of match funds spent. Subrecipients can only report in categories they are awarded in. If a category is grayed out, and you would like to request reimbursement in that category, a budget modification is needed:

Financial Report Details

Reporting Period: *

10/05/2020 - 10/05/2020

Category	Spend	Match	Spend + Match	Award Remaining
1. Equipment Repair/Replacement	$ 0.00	$ 0.00	$ 0.00	$ 0.00
2. Contingency (10%)	$ 0.00	$ 0.00	$ 0.00	$ 1,032.00

Report Total	Spend	Match	Spend + Match
	$ 0.00	$ 0.00	$ 0.00
	0.00 %	0.00 %	

☐ Reimbursement Request

☐ This is my final report

6. The *Spend+Match* and *Award Remaining* columns will automatically calculate the costs when you update the Spend and Match amounts. Additionally, the Report Totals will automatically calculate to provide a breakdown of the amounts and percentages of funds used in the Reporting period:

Category	Spend	Match	Spend + Match	Award Remaining
1. Equipment Repair/Replacement	$ 10,320.00	$ 0.00	$ 10,320.00	$ -10,320.00
2. Contingency (10%)	$ 0.00	$ 0.00	$ 0.00	$ 1,032.00

Report Total	Spend	Match	Spend + Match
	$ 10,320.00	$ 0.00	$ 10,320.00
	100.00 %	0.00 %	

☑ Reimbursement Request*

$ 10,320.00

☑ This is my final report

7. Once complete, check *Reimbursement Request*. The box will auto populate with the amount from the spend column. If different, define the amount you are requesting for reimbursement.

Category	Spend	Match	Spend + Match	Award Remaining
1. Equipment Repair/Replacement	$ 10,320.00	$ 0.00	$ 10,320.00	$ -10,320.00
2. Contingency (10%)	$ 0.00	$ 0.00	$ 0.00	$ 1,032.00

Report Total	Spend	Match	Spend + Match
	$ 10,320.00	$ 0.00	$ 10,320.00
	100.00 %	0.00 %	

☑ Reimbursement Request*

$ 10,320.00

☑ This is my final report

8. When this is the final report and the final request for reimbursement, check the box *This is my final report.* The grant closeout process will automatically begin once this box is checked and submitted.

9. Include any spending details and a brief description about the reporting period's expense in the Financial Report Narrative:

Financial Report Narrative *

Please develop your narrative below including key metrics, spending details, and other pertinent details.

</> H1 H2 H3 B I U ≡ ≣ ⊟ ⊟ %

10. You **MUST** upload the following documents:
    a. An updated SFB BRG Budget Worksheet
    b. Purchase Order
    c. Invoice(s)

Click on *Upload File* to attach the documents

Financial Report Files

Please upload any files necessary For your financial report. This may include financial transactions, receipts, program income, etc...

Upload File ☁

Show 10 ▼ entries   Search:

File Name	File Size	Actions
No files are available for download		

Showing 0 to 0 of 0 entries   Previous Next

11. When you are finished, click *Submit Report*:

Showing 0 to 0 of 0 entries

No files are available for download

Previous   Next

Submit Report   Cancel

12. Click *"OK"*:

Warning!

Are you sure you want to submit your financial report? This will send the contents of this form to the grantor for approval.

Cancel   OK

13. You will be taken back to the Award Detail page, where the Financial Report will now be recorded under the Financial Activities:

Financial Activities

Show 10 ▼ entries   Search:

Financial Report	Reporting Period	Date Created	Current Status	Actions
Financial Report	06/01/2019 -- 06/30/2019	07/09/2019	Pending Approval	

Showing 1 to 1 of 1 entries   Previous   1   Next

14. The Financial Report status will change, depending on the approver's actions:

Financial Activities

Show 10 ▼ entries   Search:

Financial Report	Reporting Period	Date Created	Current Status	Actions
Financial Report	05/01/2019 -- 05/31/2019	07/09/2019	Approved / Awaiting Payment	
Financial Report	06/01/2019 -- 06/30/2019	07/09/2019	Approved / Paid	
Financial Report	07/01/2019 -- 07/31/2019	07/09/2019	Pending Approval	

Showing 1 to 3 of 3 entries   Previous   1   Next

    a. Pending Approval: The Financial Report has not been reviewed
    b. Approved/Awaiting Payment: The Financial Report has been reviewed and is waiting for payment
    c. Approved/Paid: The reimbursement is complete.

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