eCivis Portal User Guide for Subrecipients

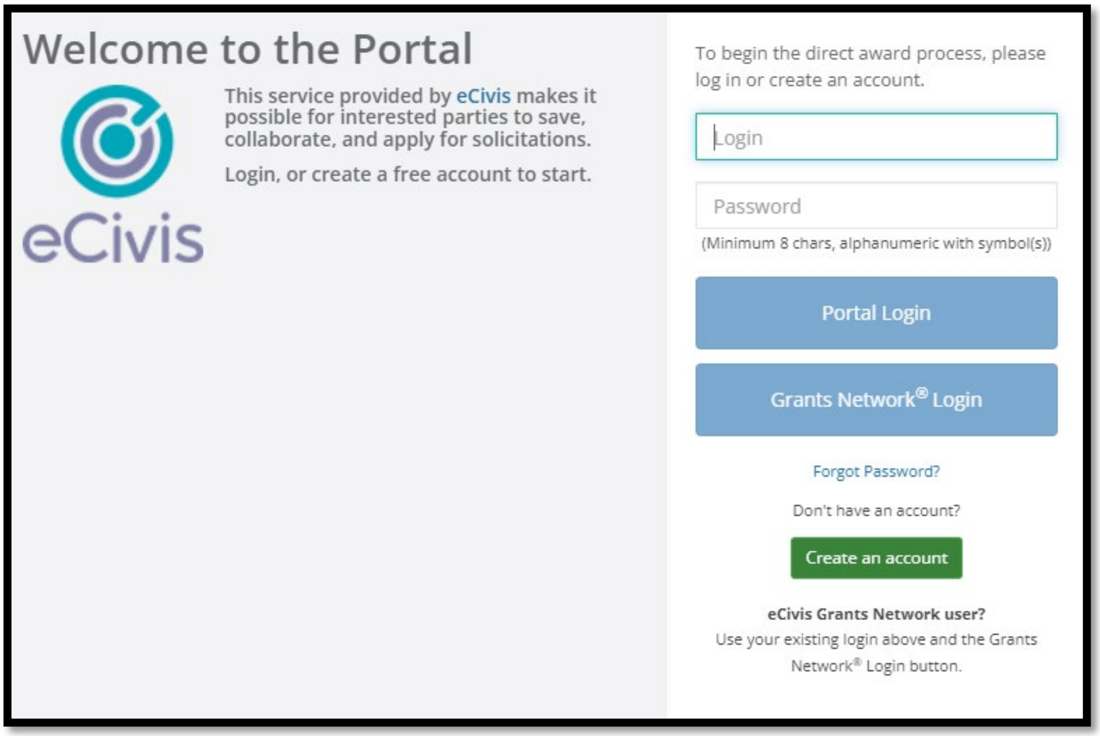
Preferred browsers: Google Chrome, Firefox, or Microsoft Edge.

Contents

1. Creating an Account

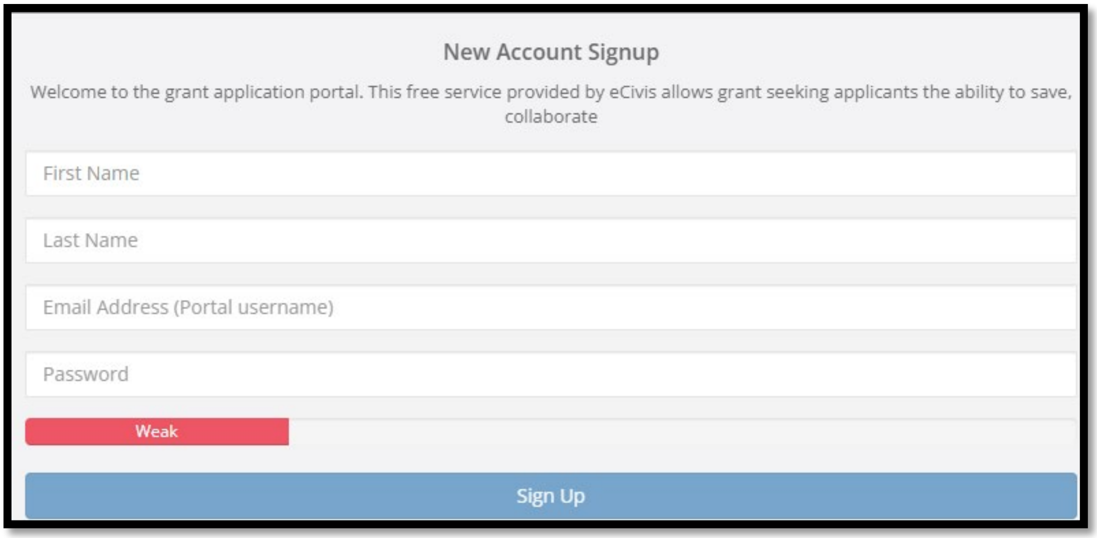
If you are an eCivis Grants Network user, when creating an account, your email address will recognize you as an active eCivis user. When you login to the portal, you will click the Grants Network Login button. If you are an external user, not known to eCivis Grants Network, you will login by clicking the Portal Login button.

1) Access the eCivis Portal by clicking here.



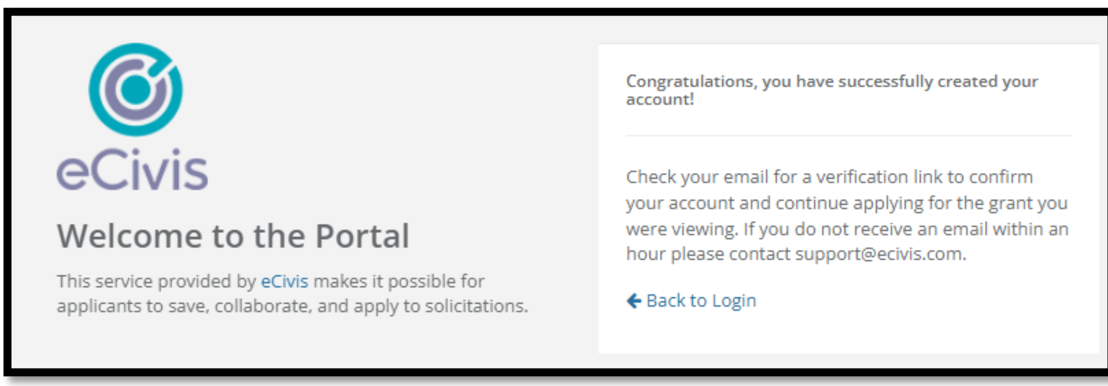
2) Click on the “Create an account” button.

3) On the New Account Setup page enter your First Name, Last Name, Email Address and create a Password. When complete, click the Sign-Up button.

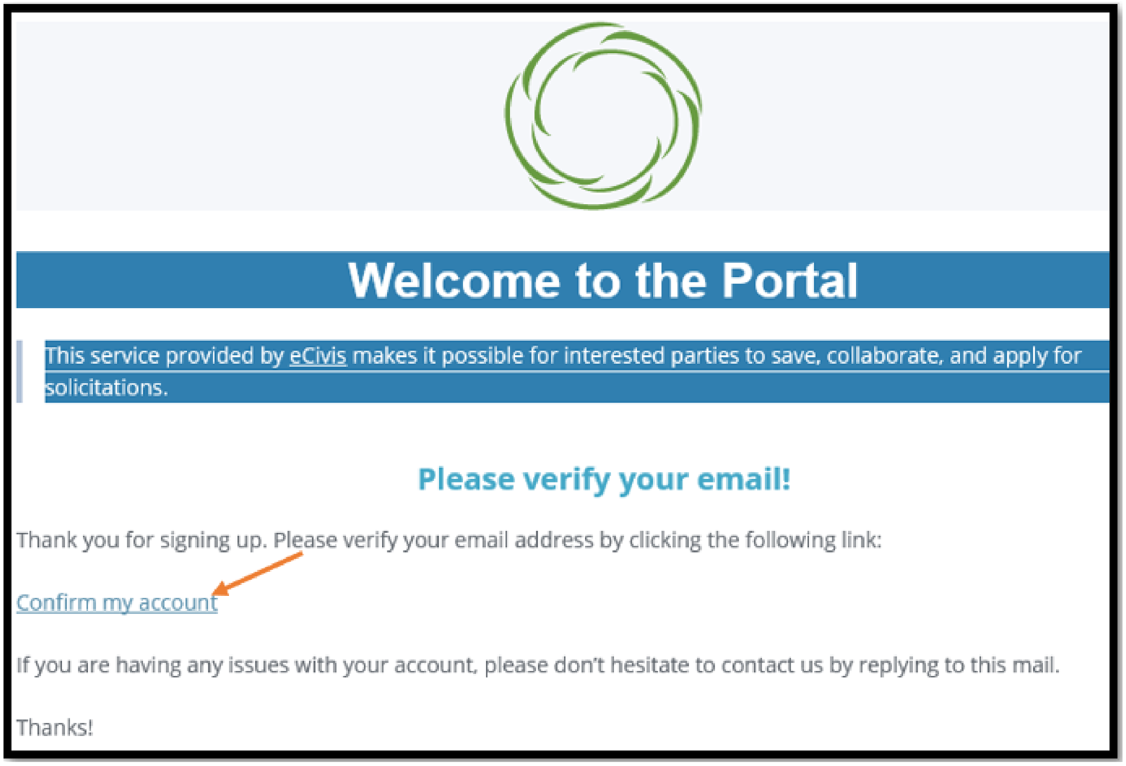


4) You will receive a confirmation email, click on the Portal link to confirm your email, and activate your account.

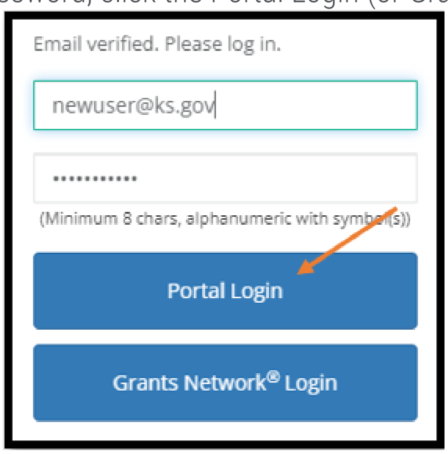
   Note: If you do not receive an email within a few minutes, check your spam/junk mail folder.



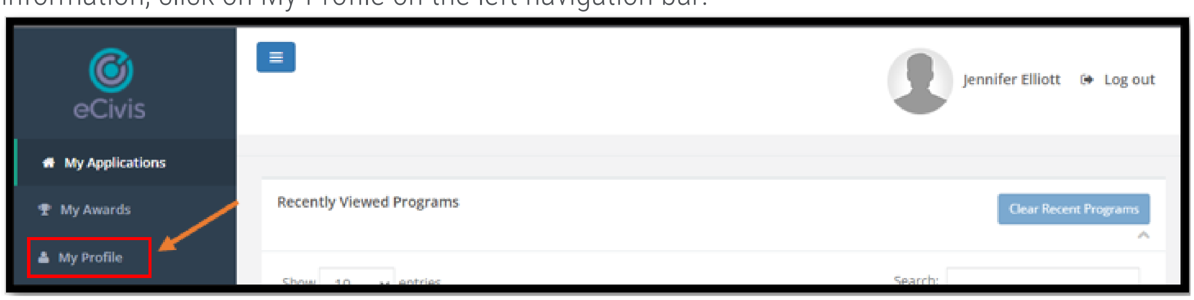
5) Click the Confirm my account link to log into the eCivis Portal to complete the process.



6) Enter your username and password, click the Portal Login (or Grants Network Login) button.

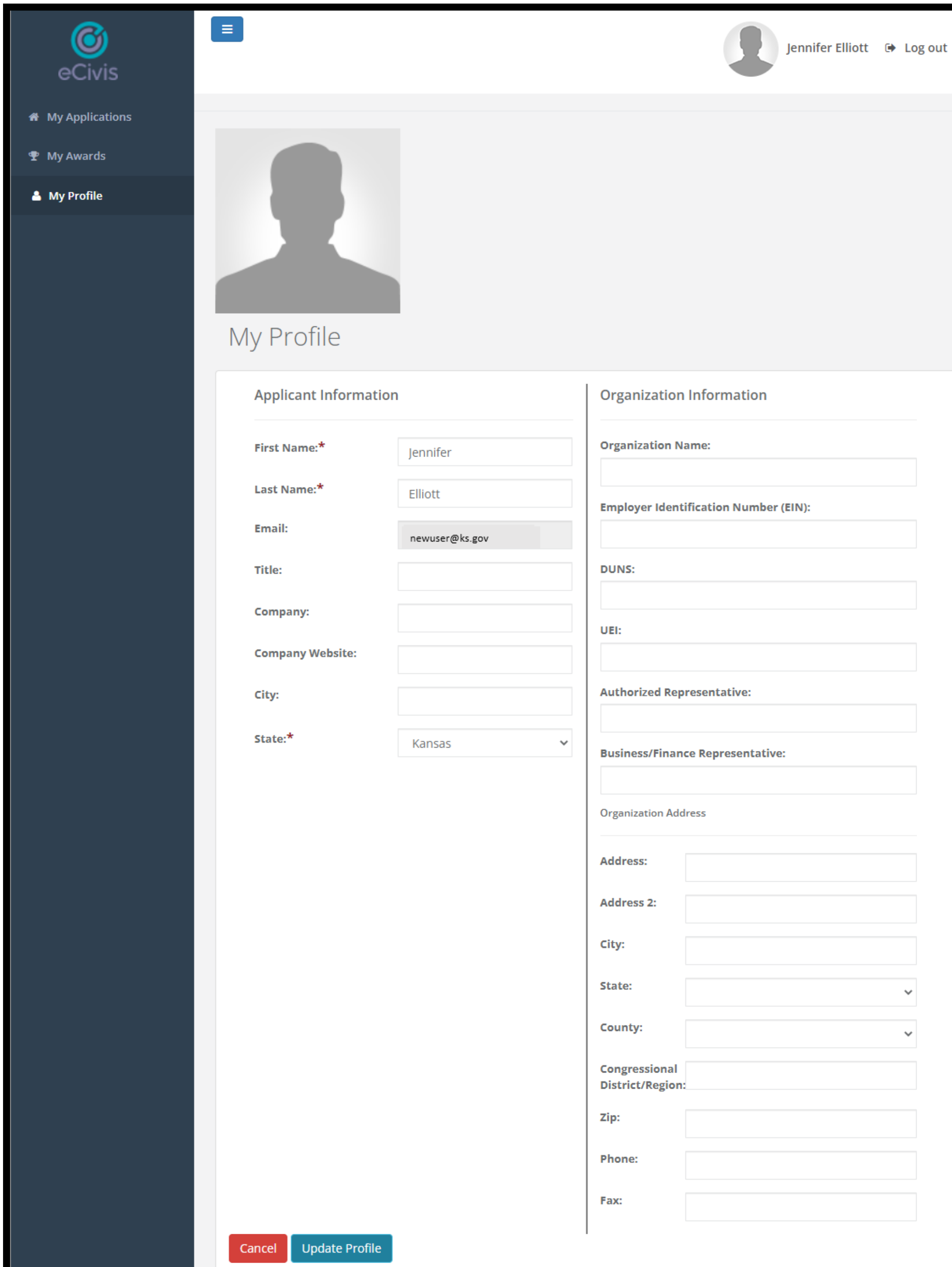


7) At initial login, the first view is of the My Applications page. To update your profile information, click on My Profile on the left navigation bar.



8) Your First Name, Last Name and Email will display. Complete the Applicant Information and Organization Information.

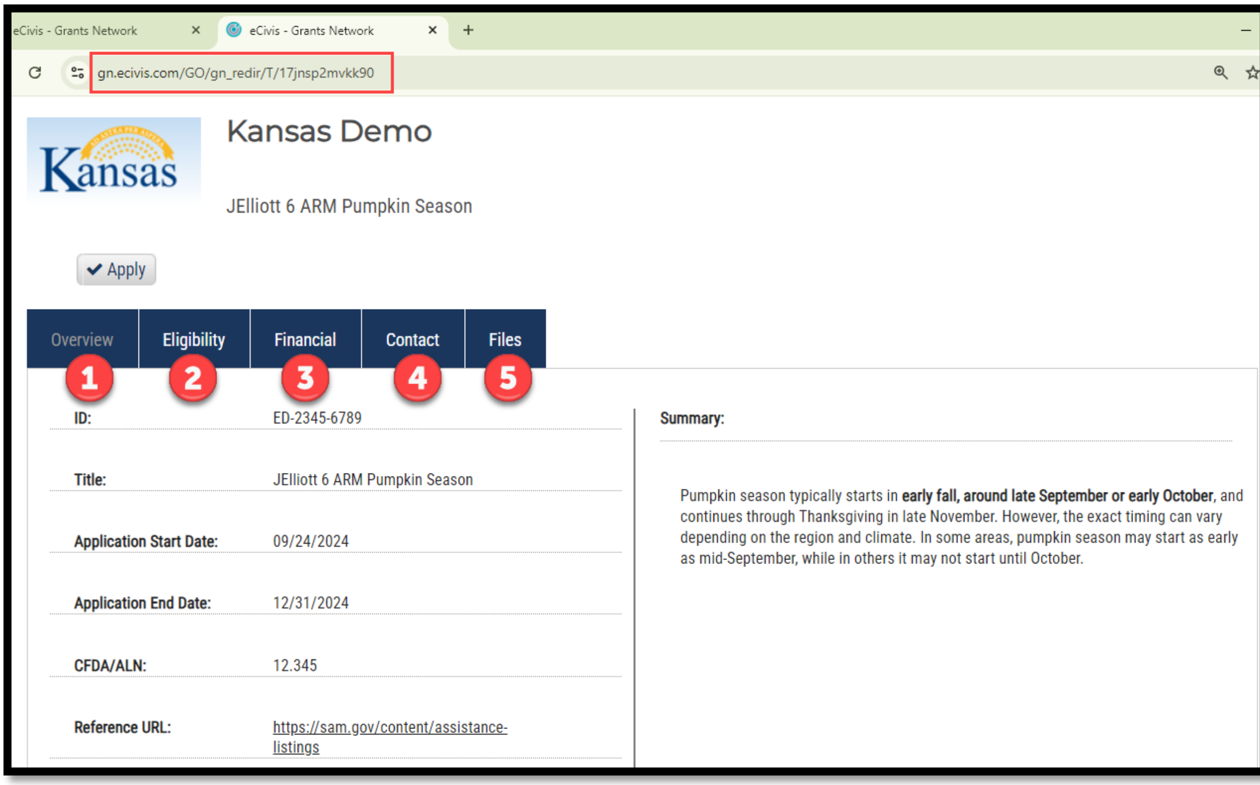
9) When complete click the Update Profile button.



2. Completing and Submitting an Application

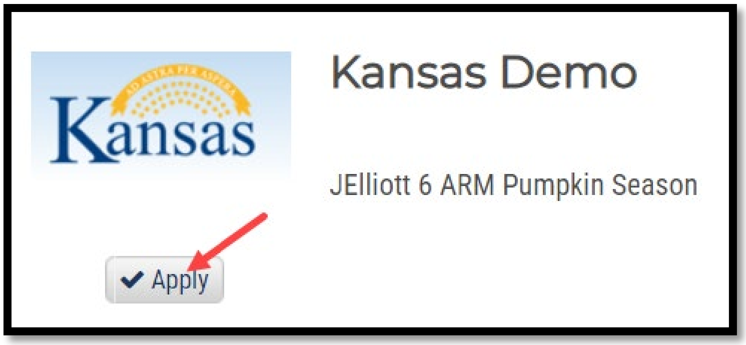
Awards requiring an application must be submitted via the eCivis Portal. The grantor will have provided a link to the program which requires the application. Note, if you are currently logged in to the portal, the initial steps may vary.

1) Access the application/solicitation by pasting the URL into a web browser or if provided a link, click the link.
2) As an applicant, when viewing the solicitation, the following tabs contain information relevant to the program.

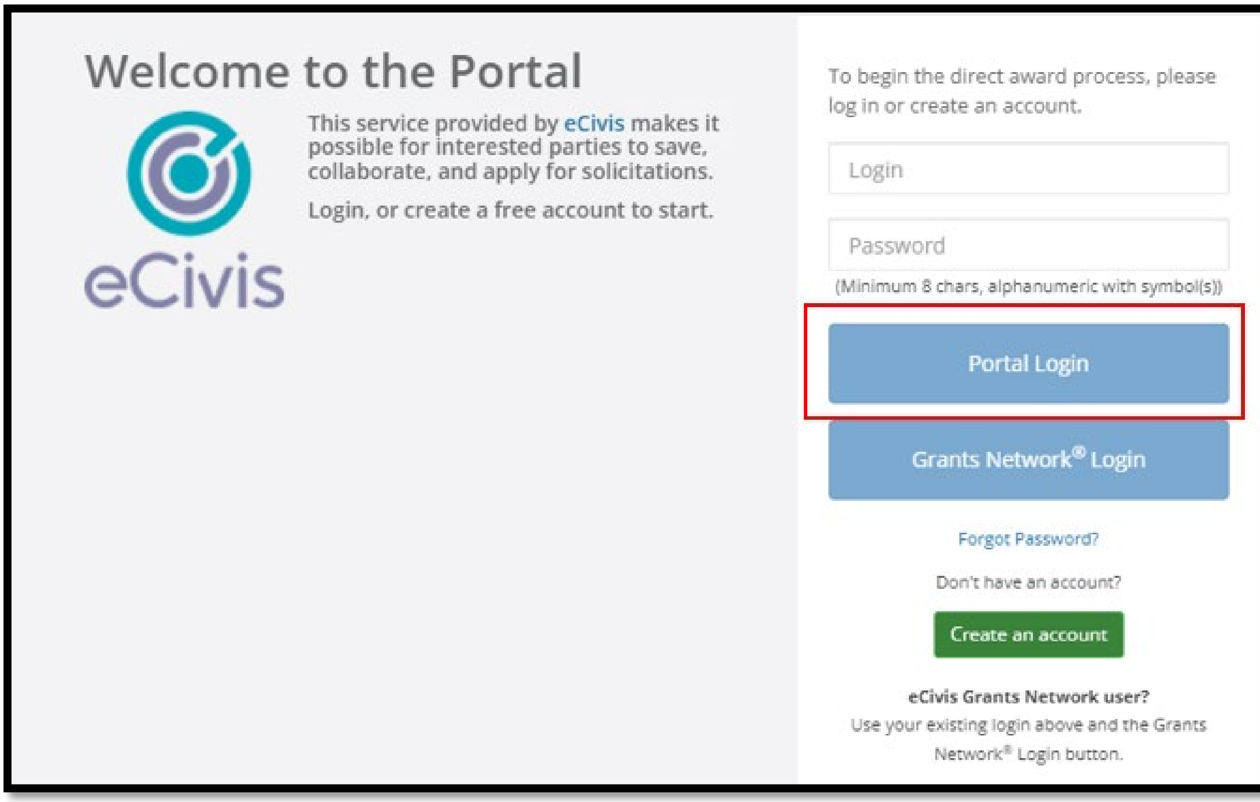


1. Overview – Provides a high level of description of the funding opportunity.
2. Eligibility - Provides the type of applicant (non-profit, private sector, local government, etc.).
3. Financial – Provides details of the funding available, such as number of awards, match required, etc.
4. Contact – Provides contact information from the agency and/or technical assistance for the portal.
5. Files – Files relevant to the funding opportunity or user guides.

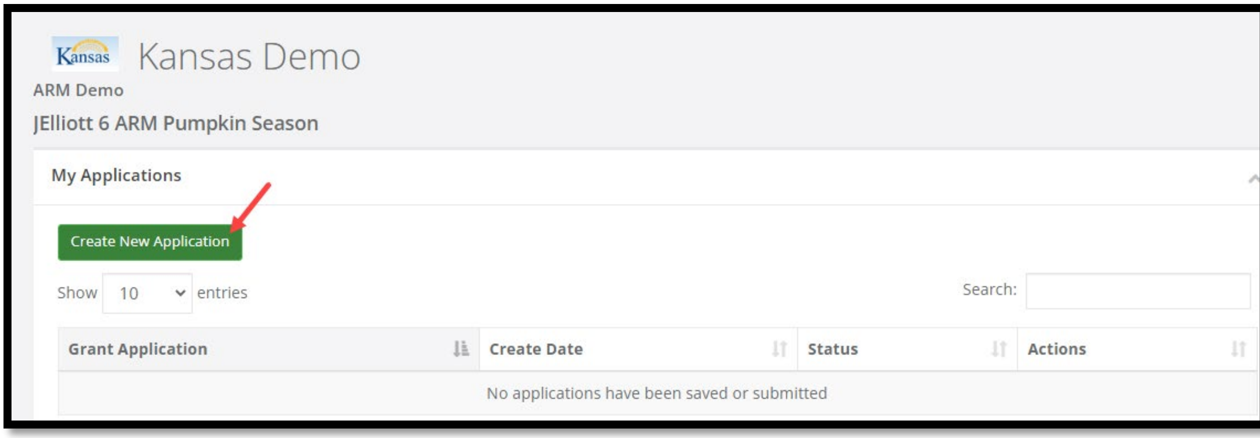
3) After a review of the funding opportunity, click the Apply button to begin the application process.



4) After clicking Apply, the eCivis Portal opens, if an account exists, enter the login information, otherwise, create an account (see Creating an Account).

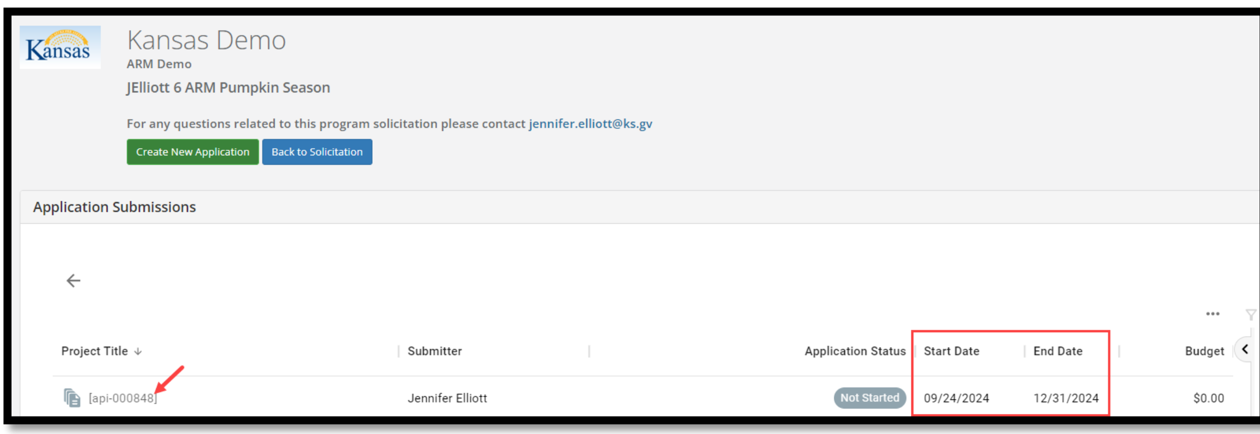


5) After logging in to the Portal, My Applications will display. Click the Create New Application button.



6) On Application Submissions page, notice the Start Date & End Date, this is the application timeframe set by the Grantor to accept applications. Click the Project Title (api link) to begin the application process.

NOTE: Do not click “Create New Application” on the Application Submissions page, unless it is intentional

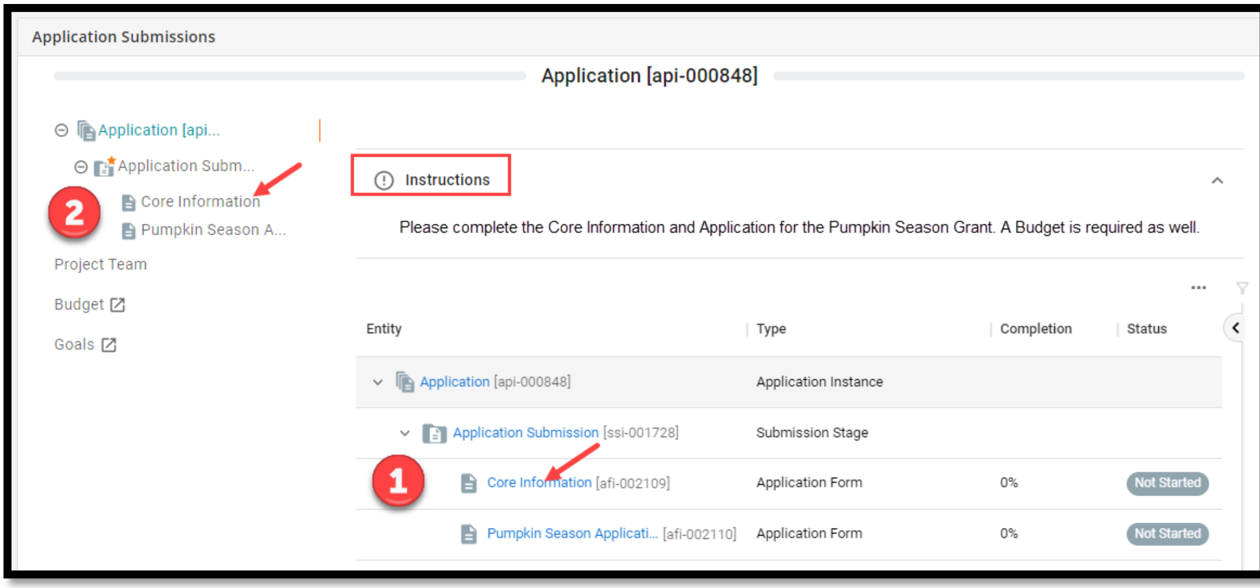


7) Review the application Instructions from the Grantor. Forms to complete include the Core Information (required), Application form(s), add a Project Team, create a Budget and/or Goals.

In this example the application process will be completed in the following order:

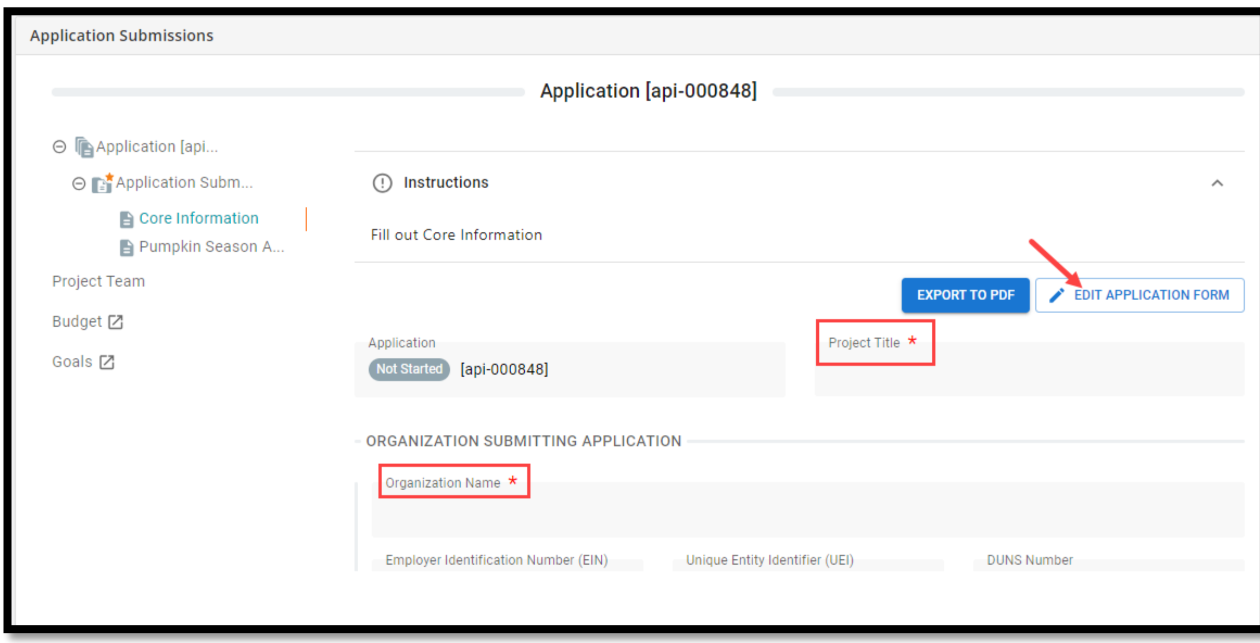
Core Information, Application, Budget, and adding a Project Team, then Complete (submitting application); Goals are not included.

There are two ways to access forms, 1) click on the link under the Entity heading, or 2) click on the menu bar on the left side of the page. The content under Entity will later be referred to as the “process tree”.

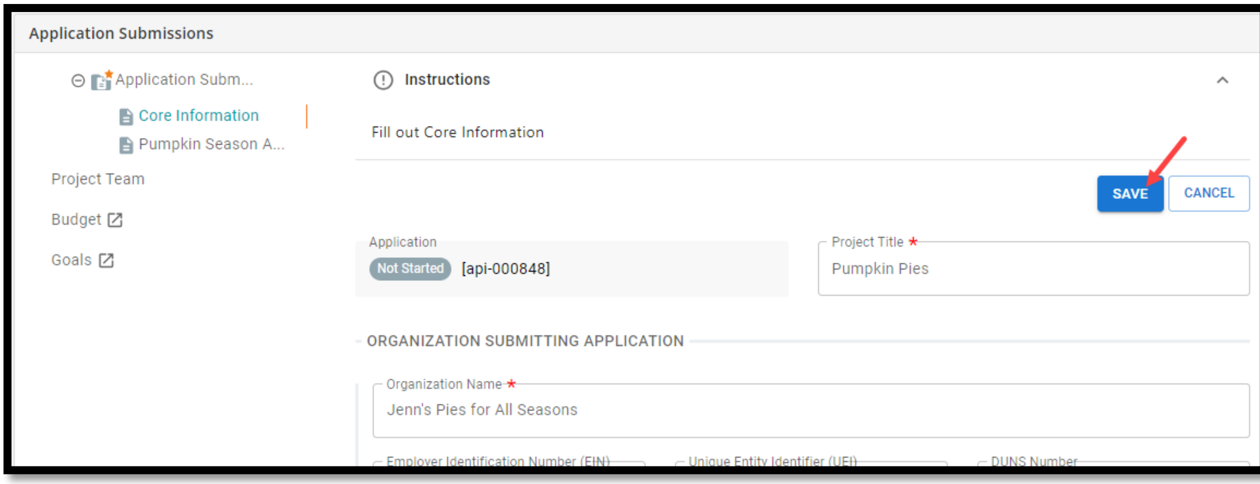


8) Clicking on the Core Information will display a form to complete. All required items are indicated with a red asterisk (*).

To begin, click the Edit Application Form button.



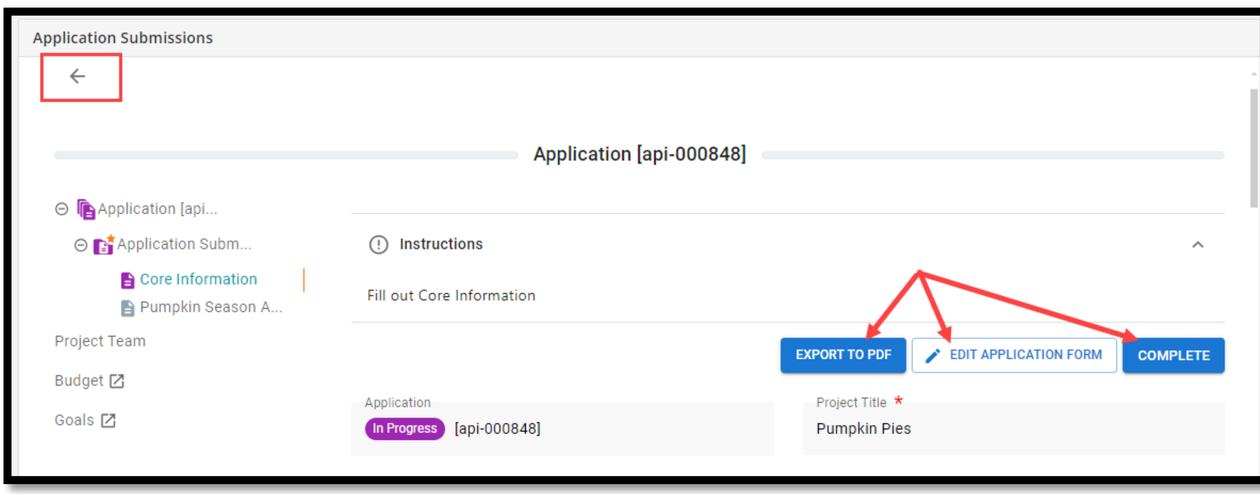
9) Once complete click the Save button.



10) After the form has been saved, options include to export the form, return to the form by clicking the Edit Application Form button and marking the Core Information as Complete.

Tip: Do not click Complete until the entire application package is ready to be submitted.

To return to the process tree, click the arrow in the top left corner.

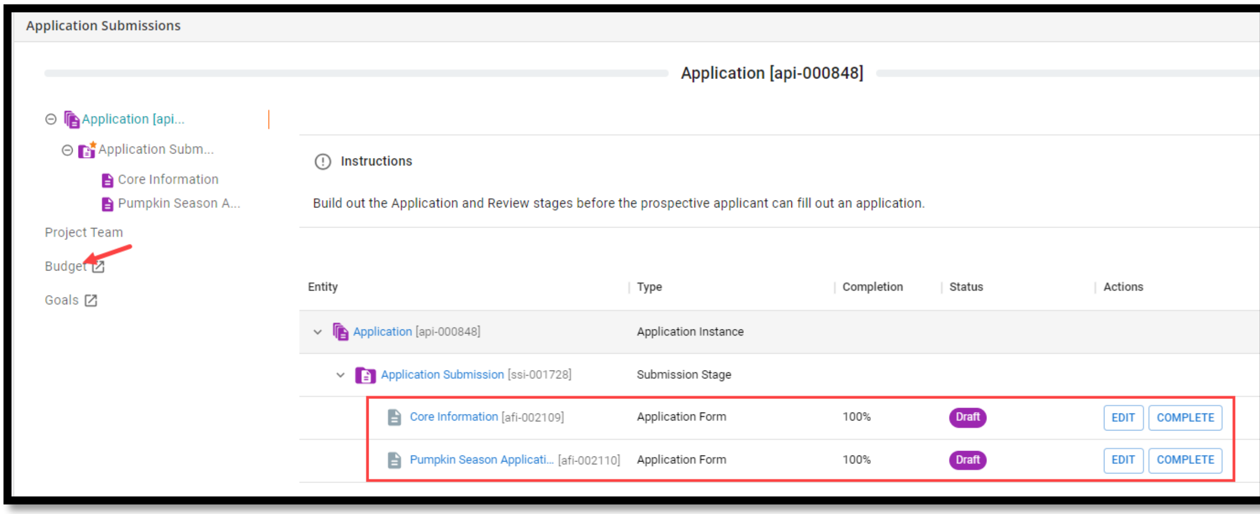


11) The process tree will display with the Core Information form in a Draft status; that form may be edited or marked as complete. To continue the application process, click the next form option link or go directly to the Edit button.

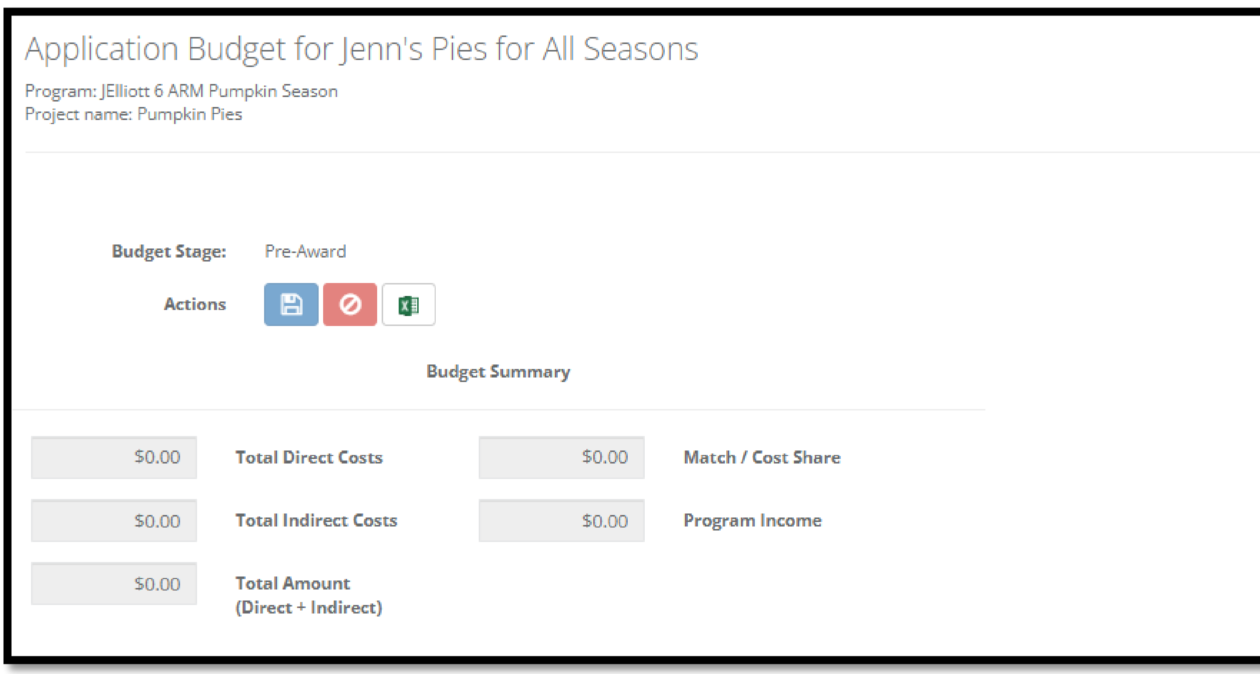
Once complete click the Save button. Return to the process tree by clicking the arrow at the top left of the page.

After both Core Information and Application form have been complete, the % of completion is displayed, the status is Draft and options available are Edit or Complete.

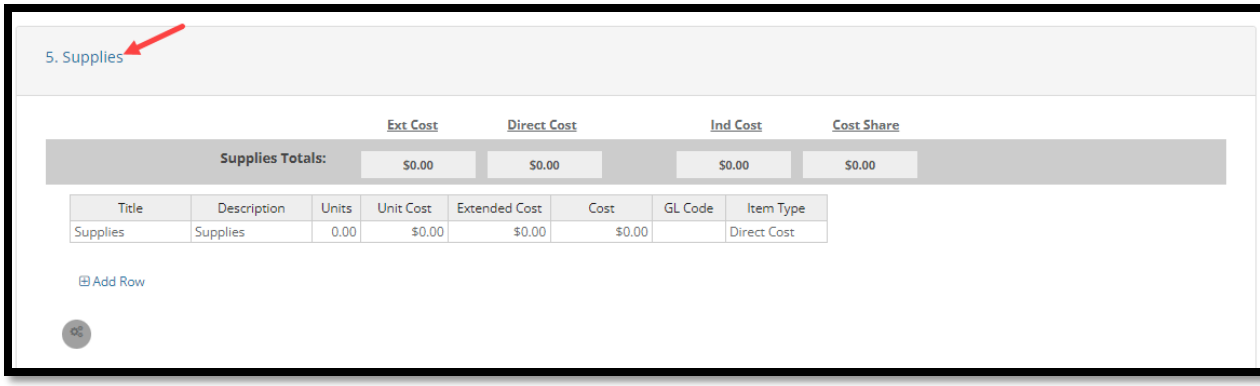
To build a budget to submit with the application, click the Budget link on the left side of the page.



12) A new browser window will open. The budget is the standard federal budget with predefined categories (SF-424). To build out the budget based on category, select the categories that best fit the grant application.



13) In this example, the requested grant amount of $5,000 will be entered in the Supplies category. Click on the category link, additional information will appear. Enter as much information as necessary to support the requested budget amount.



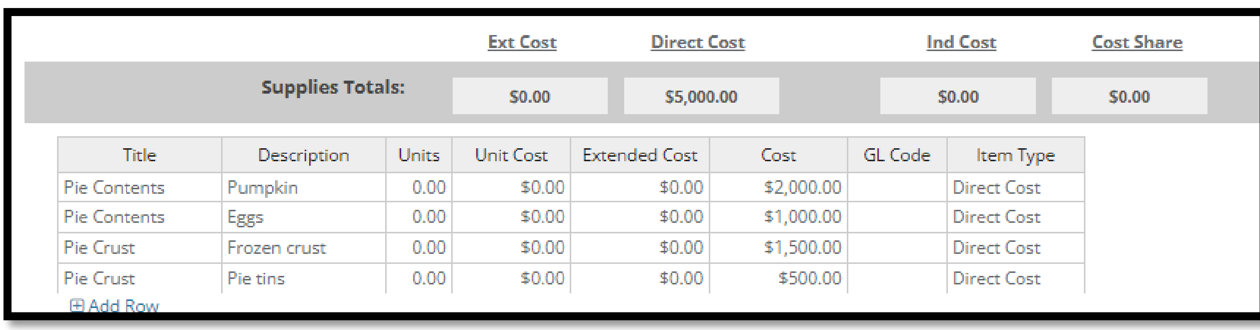
5. Supplies

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

Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Item Type
Supplies	Supplies	0.00	$0.00	$0.00	$0.00		Direct Cost

⊞ Add Row

NOTE: More than one category may be utilized; under one category, additional rows can be added to build out the detail (click Add Row). Keep in mind that when a financial report is submitted, based on the approved budget, the amount of spend is a single dollar amount (associated with Direct Cost). You will not report at the detail level.

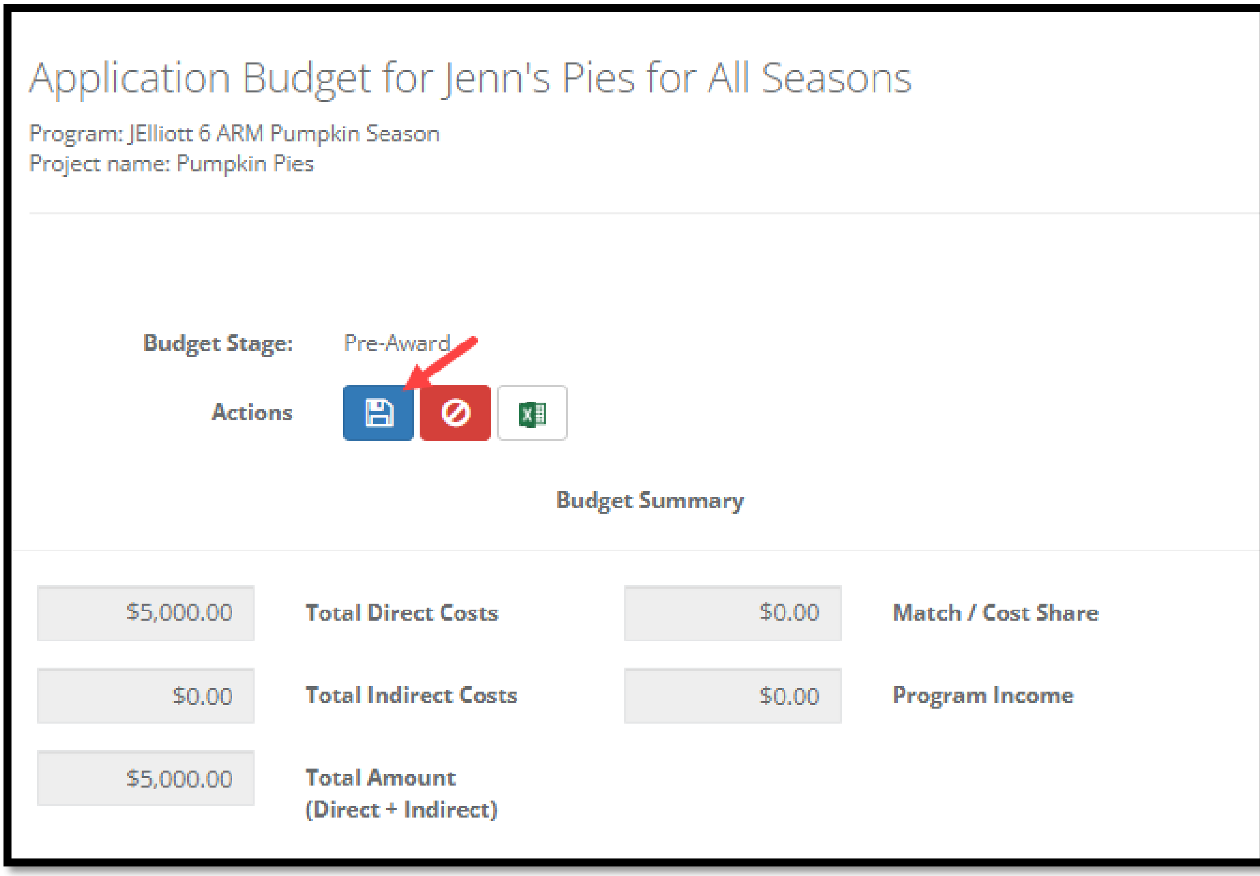


	Ext Cost	Direct Cost	Ind Cost	Cost Share
Supplies Totals:	$0.00	$5,000.00	$0.00	$0.00

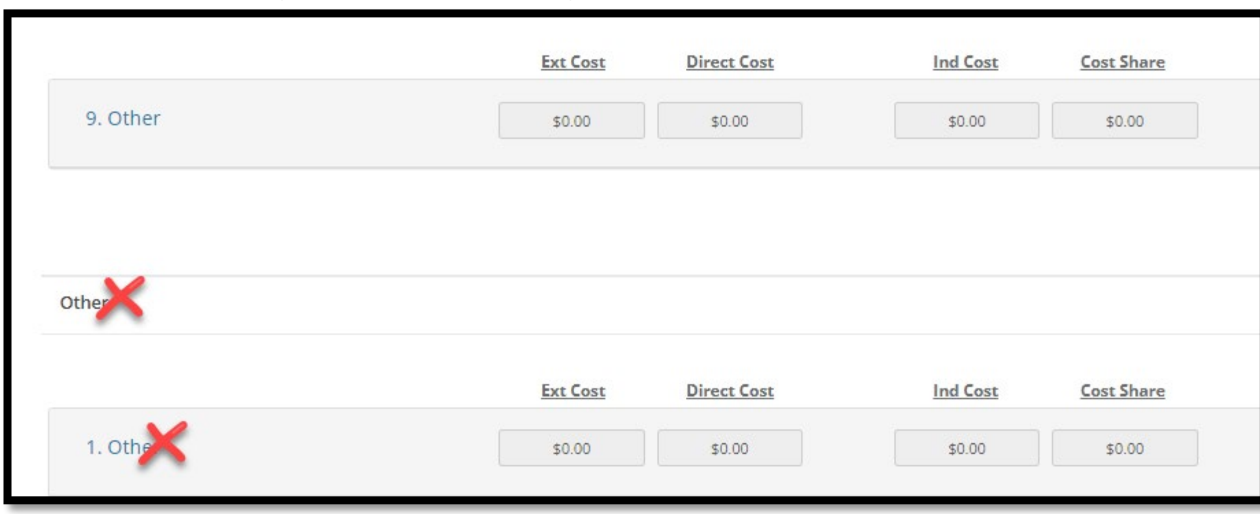
Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Item Type
Pie Contents	Pumpkin	0.00	$0.00	$0.00	$2,000.00		Direct Cost
Pie Contents	Eggs	0.00	$0.00	$0.00	$1,000.00		Direct Cost
Pie Crust	Frozen crust	0.00	$0.00	$0.00	$1,500.00		Direct Cost
Pie Crust	Pie tins	0.00	$0.00	$0.00	$500.00		Direct Cost

⊞ Add Row

14) Scroll to the bottom of the page to locate the budget narrative, enter a narrative if desired; this is not required. When the budget is complete click the Save button at the bottom of the page or scroll to the top of the page and click the Save icon.



15) Important Note: There are 2 “Other” categories. The number “9. Other” can be used if needed. The “Other & 1. Other” should not be used. If costs are entered, they will not be included in the overall budget or financial reporting.

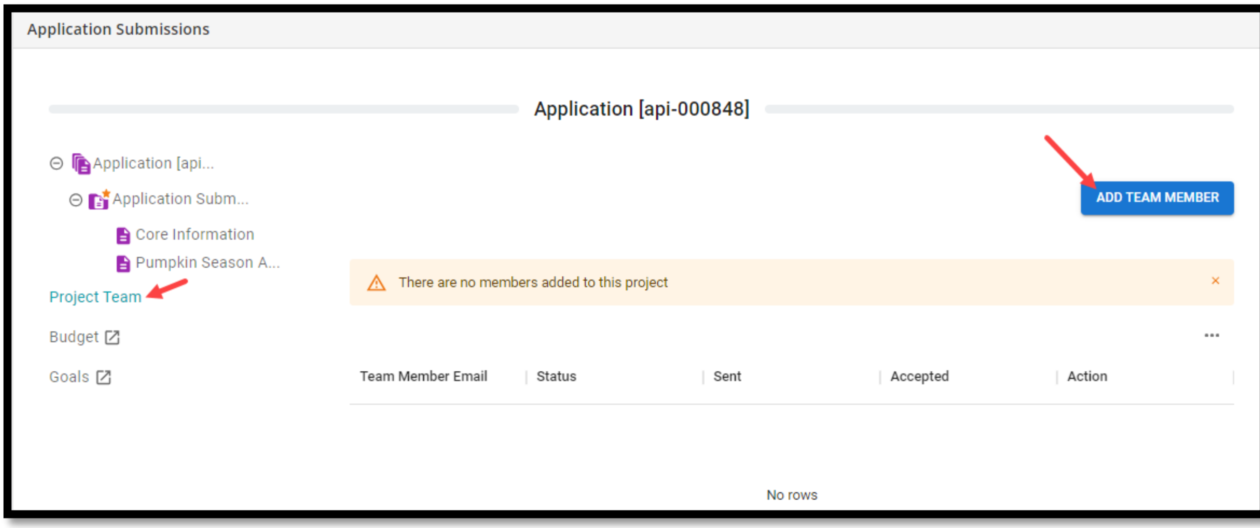


16) When the budget is successfully saved, close the browser window and return to the application.

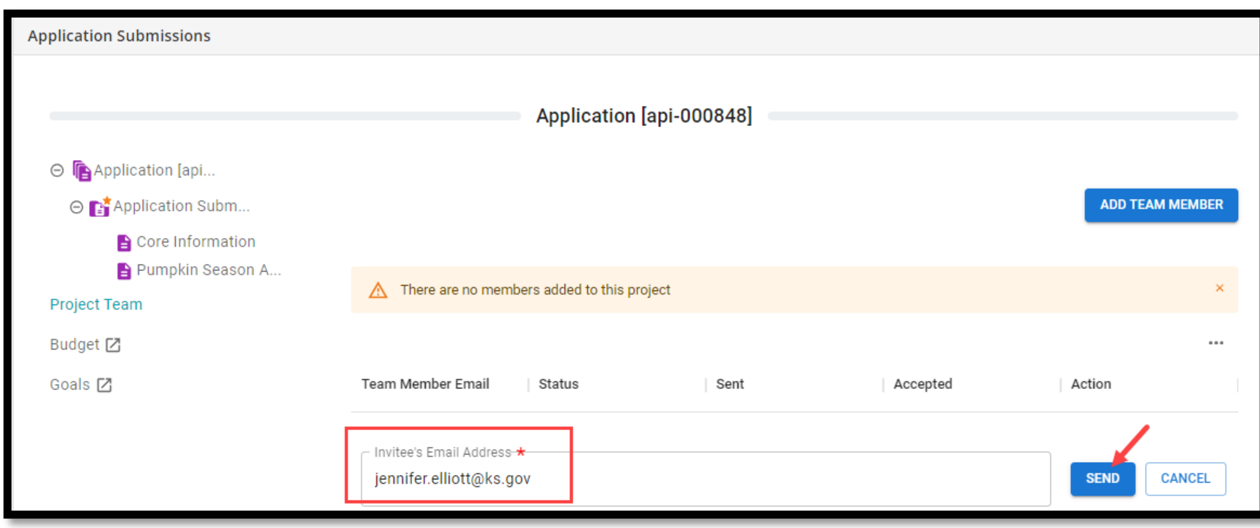
If Goals are required, click on the Goals link on the left side of the page. This will open a new browser window. When complete close the window and return to the application.

17) To allow other individuals access to the application process, click the Project Team link on the left side of the page, then click the Add Team Member button.

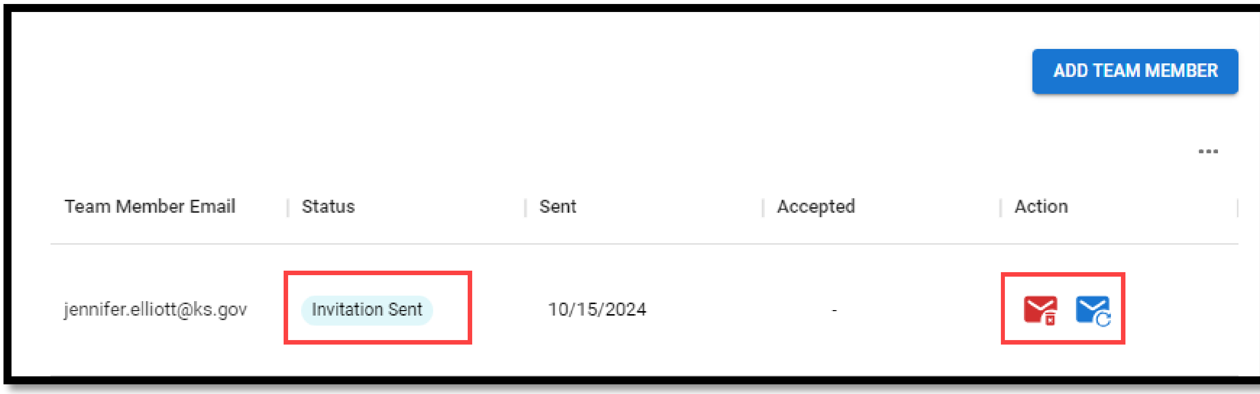
NOTE: Additional team members will need to create an eCivis Portal user account.



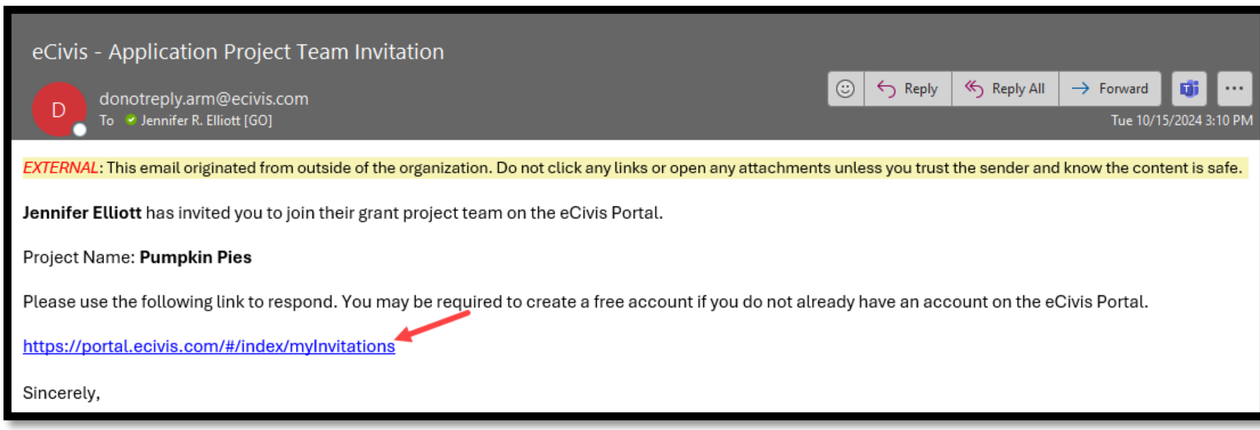
18) Enter the email address of an individual to add to the application process in the Invitee's Email Address and click the Send button.



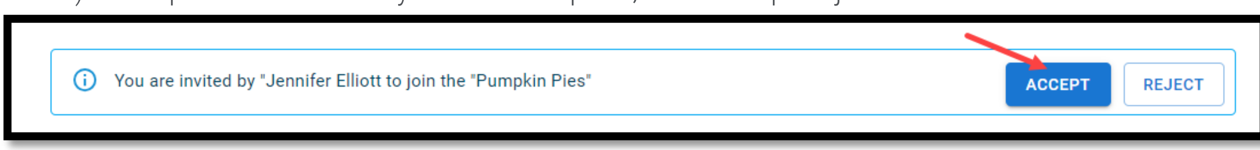
19) The status is Invitation Sent; the two Actions include a Delete and Resend button. An invitation can be deleted if not acknowledged.



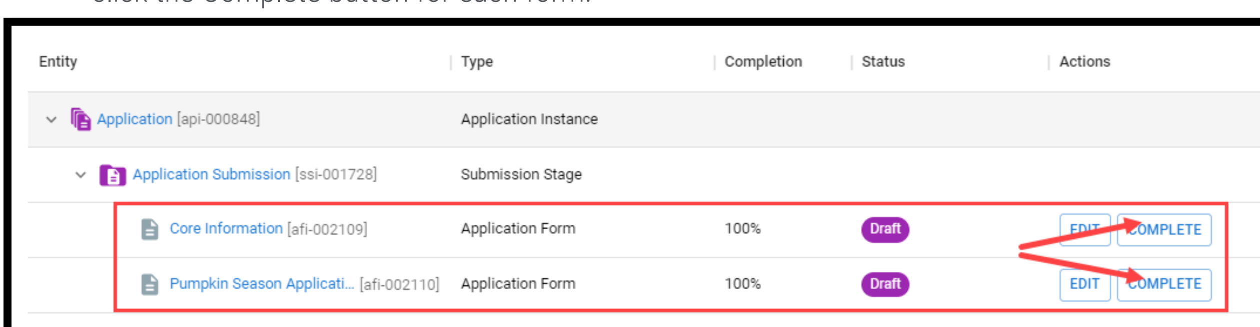
20) An email is sent from eCivis to the invitee (eCivis - Application Project Team Invitation). In the body of the email, there is a link that must be utilized to complete the process. If the invitee does not have an eCivis Portal user account, it is suggested one is created prior to clicking the link. (See Creating an Account).



21) In the portal under the My Invitations option, click Accept to join the team.



22) To submit the application forms, return to the process tree to perform a final review, then click the Complete button for each form.



3. Accepting an Award

There are steps for two types of awards. Direct award is an award to a subrecipient that by-passes the application process. The other is an award from an application submitted by the subrecipient.

3.1. Accepting a Direct Award

When a direct award is initiated by the Grantor, you will receive an email notification of the award.

Direct to Award Notification

JE Jennifer Elliott <jrelliott68@gmail.com>
To Elliott, Jennifer [GO]

eCivis

We are pleased to inform you that a direct award has been initiated for the following program:

Grantor: Kansas Demo
Program Name: Quick ARPA Path
Project Title: Viewing Simplified budget

Note from grantor:

testing to view simplified budget on portal - Using "Other"

To complete the award initiation please use the following link. If you already have an eCivis Portal account you may use that to sign in, or you will be able to create a free account to manage this award:
Initiate Direct Award

1) Click on the link at the bottom of the email notification to navigate to the eCivis Portal:

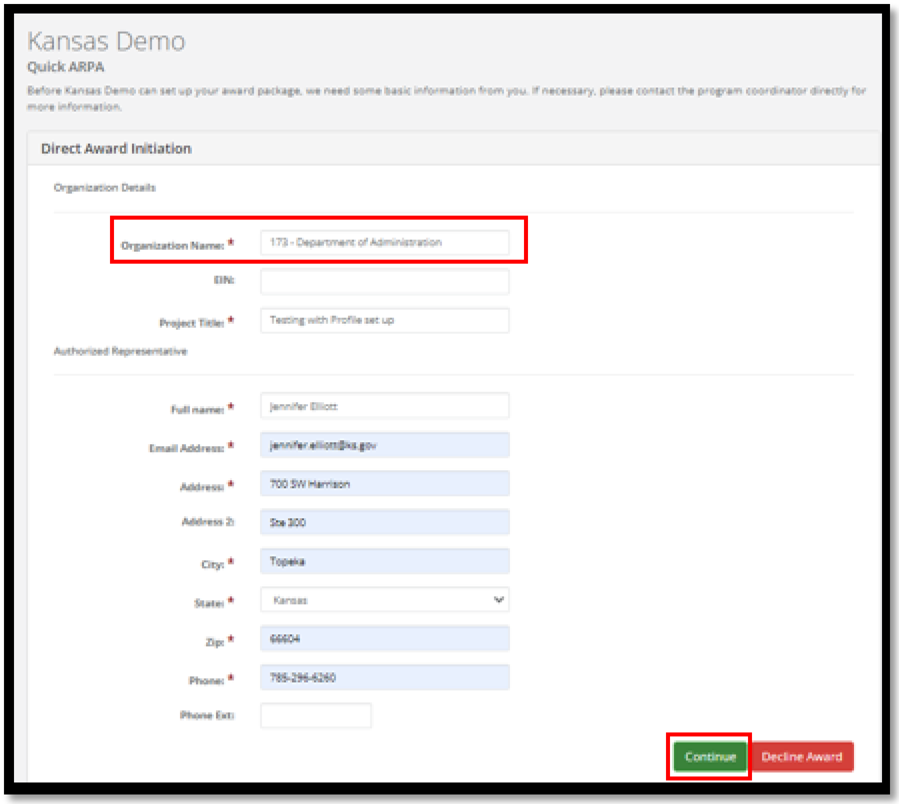
To complete the award initiation please use the following link. If you already have an eCivis Portal account you may use that to sign in, or you will be able to create a free account to manage this award:
Initiate Direct Award

2) Log into Portal, the Direct Award Initiation page will automatically display. All fields with a red asterisk (*) are required by the portal.

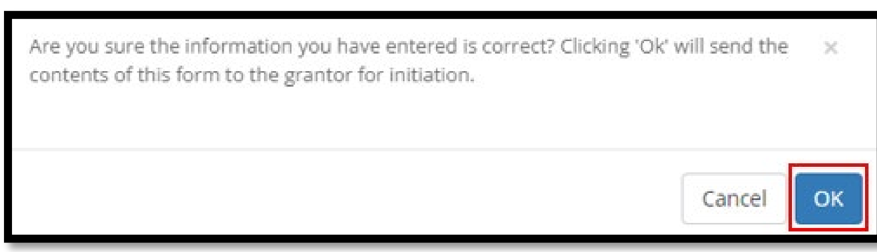
   As a State of Kansas agency, you will enter your agency number and agency name in the Organization Name field, (e.g., 173 – Department of Administration). If needed, see Appendix A for agency naming conventions.

   NOTE: EIN is not required, therefore should remain blank.

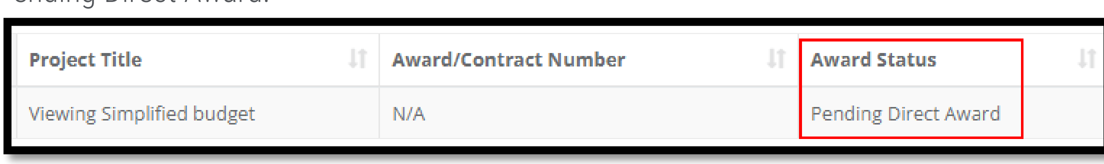
   Otherwise, follow guidance provided by the Grantor in the Direct Award Notification email.



When complete, click on the "Continue" button. A pop-up box will appear, confirming the information entered. Click the "OK" button.



3) The My Awards page will automatically display. The Project will have an award status of Pending Direct Award.



Project Title	Award/Contract Number	Award Status
Viewing Simplified budget	N/A	Pending Direct Award

An email will be generated to the Grantor notifying them you have set up an account, have responded to the direct award and they may now follow through with the award recommendation.

4) Once the award recommendation is approved by the Grantor, you will receive an email notification from eCivis for the award notification letter.

eCivis

Award Notification Letter

Dear Jennifer Elliott,

Congratulations! An award package has been created for the following program:

Project:	Viewing Simplified budget
Program:	Quick ARPA Path
Approved Amount:	$5,000.00
Federal Awards:	• ORG0027 Priority 2 for AAA AOA Medicare Enroll MIPPA 2022: $5,000.00 o Agency: U.S. Department of Health and Human Services o Fiscal Year: 2022 o CFDA: 93.071 **Total Federal:** $5,000.00
Other Awards:	No non-federal funds were included in this award.
Total Match:	$0.00
Period of Performance:	07/01/2022 - 08/31/2022
Award/Contract Number:	Your Contract Number!

5) Viewing My Awards, the award status is now Pending Acceptance.

Project Title	Award/Contract Number	Award Status
Viewing Simplified budget	Your Contract Number!	Pending Acceptance

6) On your My Awards dashboard, you may either click on the Grant Title or Actions, to navigate to the Award Acceptance page.

Clicking on the box under the Actions column, an Accept/Decline Award option will appear. Click on Accept/Decline Award.

My Awards

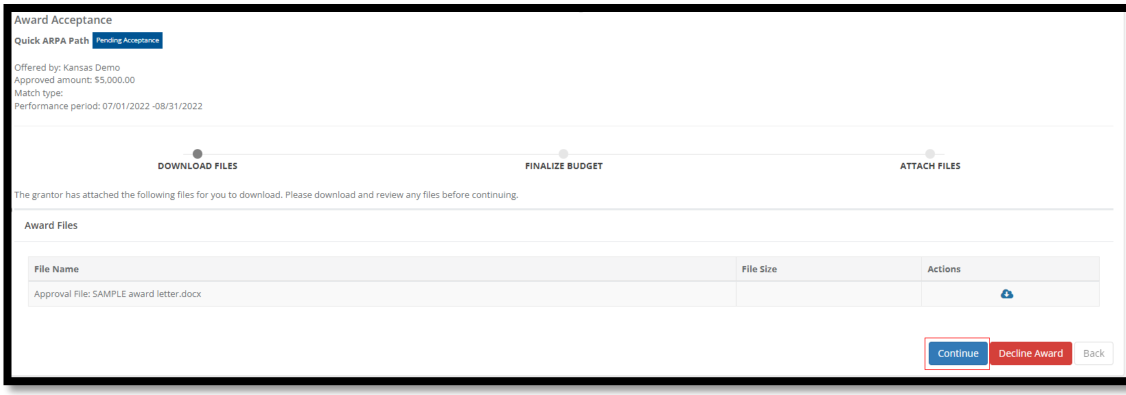
Show 10 entries Search:

Grant Title	Project Title	Award/Contract Number	Award Status	Notification Date	Performance Period	Role	Actions
Quick ARPA Path	Viewing Simplified budget	Your Contract Number!	Pending Acceptance	N/A	7/1/22 - 8/31/22	Owner	≡

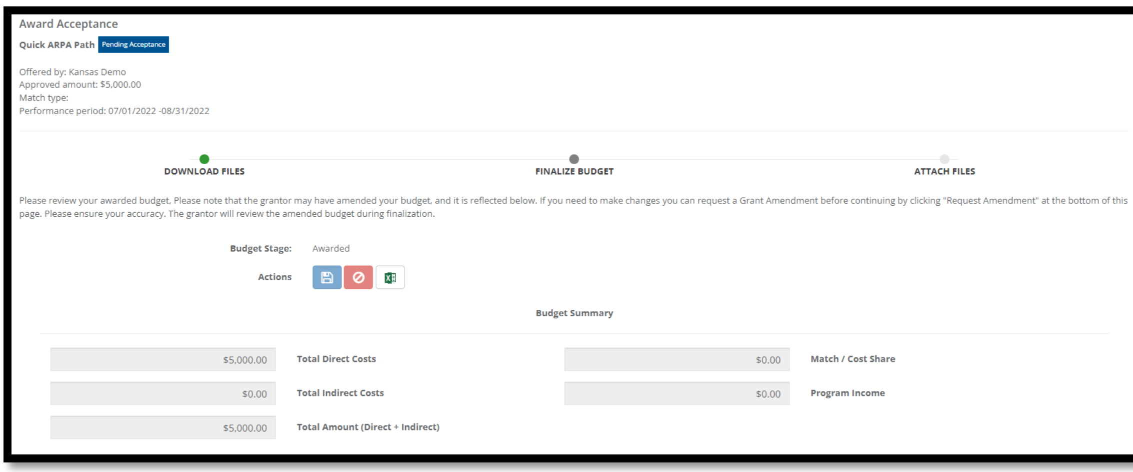
Accept/Decline Award ›

Showing 1 to 1 of 1 entries Next

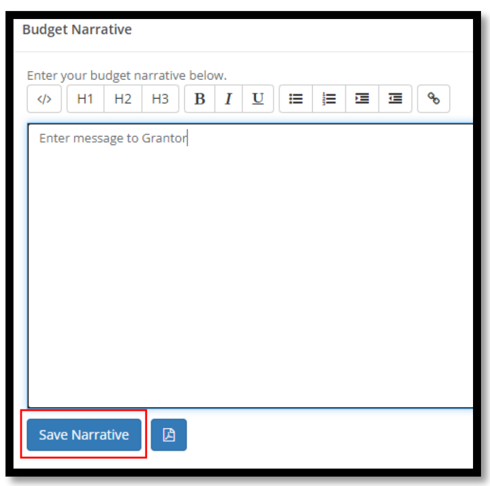
7) On the Award Acceptance page, download and view any files from the Actions column. Then, click *Continue*.



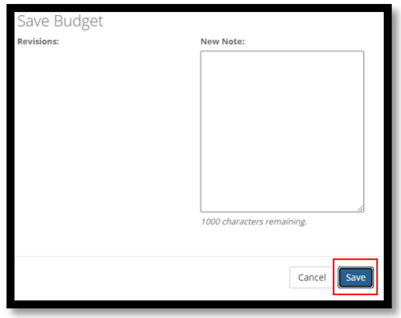
8) Review the budget created by the Grantor of your direct award.



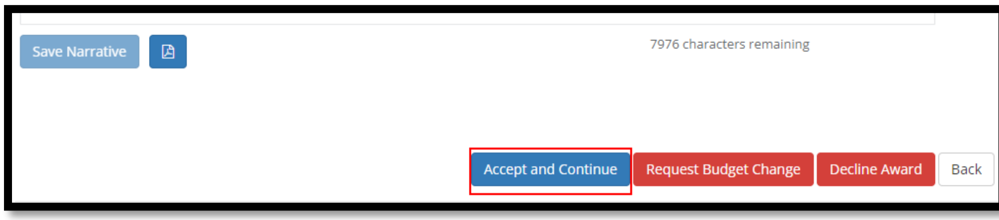
9) On the same page, scroll to the bottom to the Budget Narrative, enter a message if required by the Grantor. Click “Save Narrative.”.



A pop-up box appears, enter a new note if applicable and click “Save.”

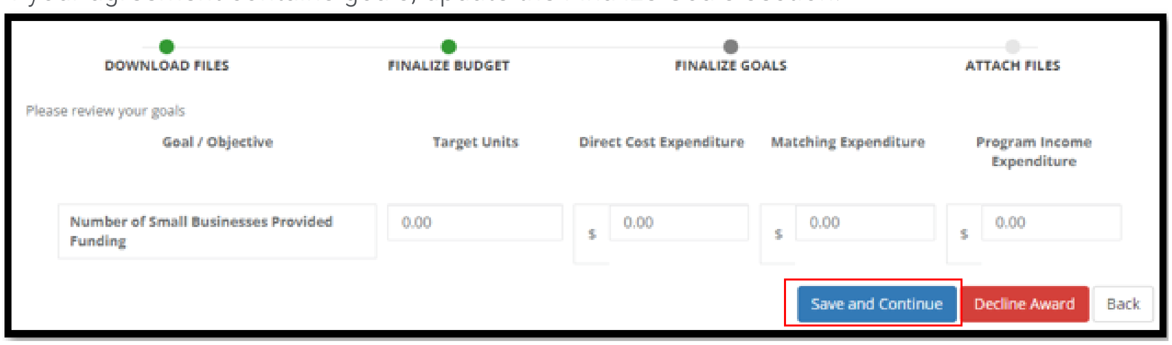


10) When complete, click “Accept and Continue” at the bottom of the page.



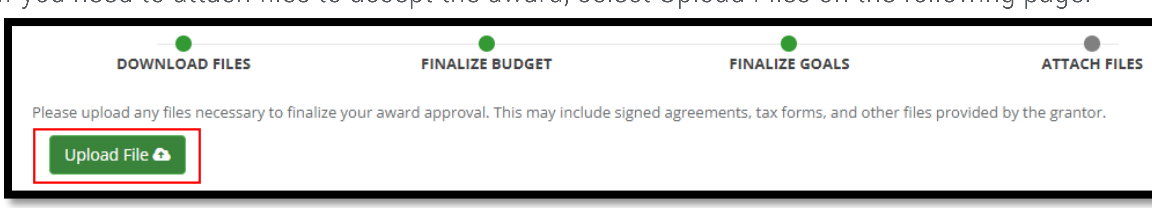
If you plan to decline your award offer, click “Decline Award.” This will stop the entire process.

11) If your agreement contains goals, update the Finalize Goals section.

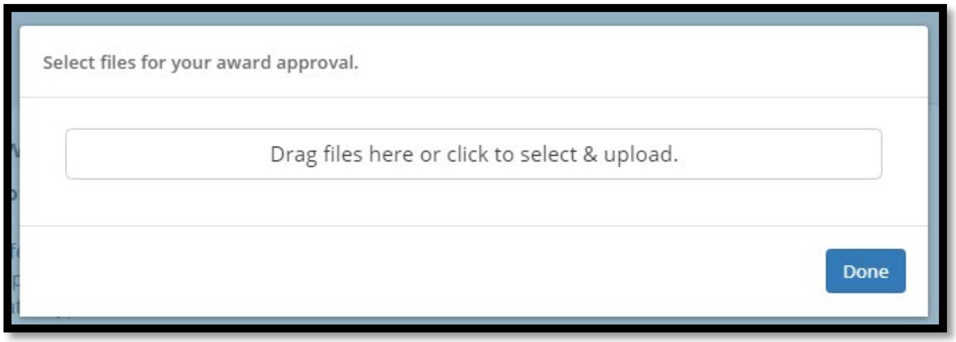


Select “Save and Continue” at the bottom of the page.

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

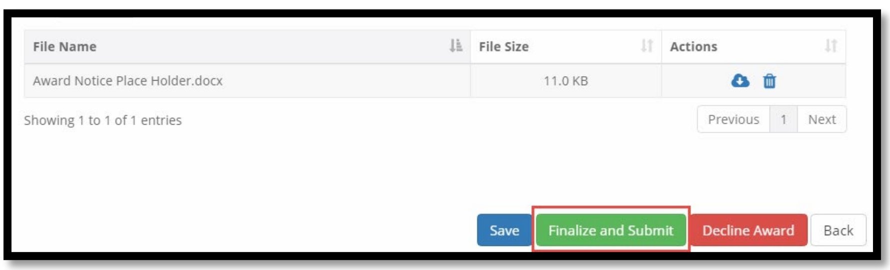


Files can be attached by selecting them from your File Explorer or dragging and dropping files from your File Explorer to the browser.

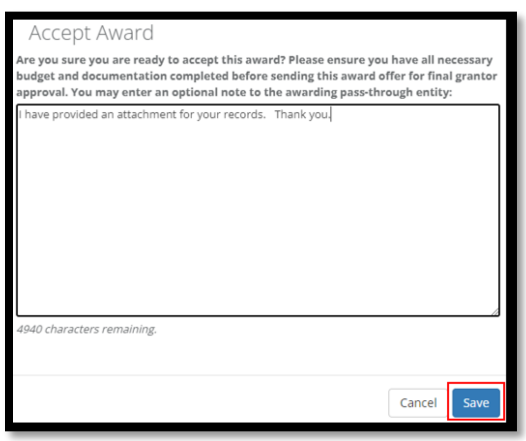


Any uploaded file can be downloaded again or deleted using the trash icon.

13) Select *Finalize and Submit* to send the Grantor notification that you have accepted the award.



A pop-up box appears confirming you are ready to accept the award. Enter a message and click the Save button.



14) Return to the My Awards dashboard; the award status is now Pending Final Approval.

Project Title	Award/Contract Number	Award Status
Viewing Simplified budget	Your Contract Number!	Pending Final Approval

15) The Grantor will review the additional attachments and finalize the grant award in eCivis. Once the final award is approved, you will receive an email notification from eCivis.

eCivis

We are pleased to inform you that your award has been approved for the following program:

Program: Quick ARPA

Project: Testing with Profile set up

You can now manage your post-award activities in the eCivis Portal. This will include submitting financial and activity reports, award amendments, and miscellaneous tasks.

Note from grantor:
Please review the award amount, performance timeframes and any documentation attached. Financial reporting frequency is quarterly, beginning in Sept 2022. Activity reporting is not required at this time.

For any questions pertaining to this award package, please contact your grantor at:
jennifer.elliott@ks.gov

Please contact support@ecivis.com for technical issues or questions.

Sincerely,

16) Return to the My Awards dashboard; the award status is now Awarded.

Project Title	Award/Contract Number	Award Status
Viewing Simplified budget	Your Contract Number!	Awarded

3.2. Accepting an Application Award

As an applicant, if your application is approved you will need to know how to accept an award and begin managing reporting requirements.

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.

eCivis

Award Notification Letter

Dear Jennifer Elliott,

Congratulations! An award package has been created for the following program:

Project: JE Dog Rescue 101
Program: JE Dog Rescue 101
Approved Amount: $445,000.00
Federal Awards:

- ORG0029 JE Dog Rescue 101: $445,000.00
    - Agency: U.S. Department of Agriculture
    - Fiscal Year: 2022
    - CFDA: 99.999

Total Federal: $445,000.00

1) Click on the link to Portal at the bottom of the email notification:

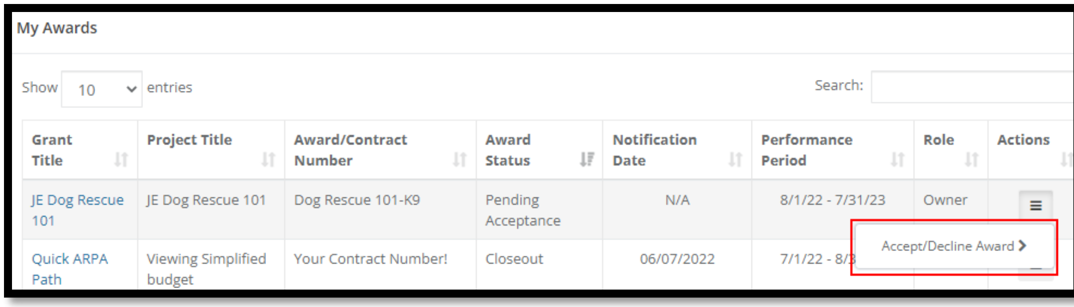
Other Awards: No non-federal funds were included in this award.
Total Match: $0.00
Period of Performance: 08/01/2022 - 07/31/2023
Award/Contract Number: Dog Rescue 101-K9
Ein: 48-1234567

Note from grantor:

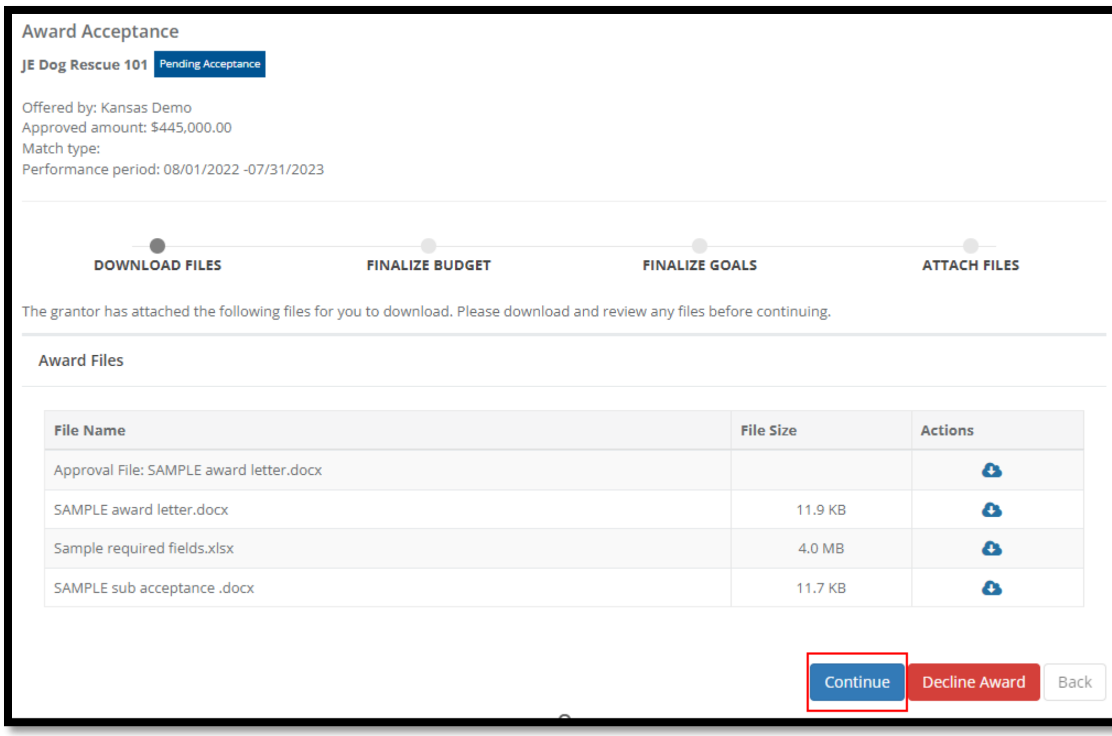
Thank you for your application and budget, this is your award recommendation.

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

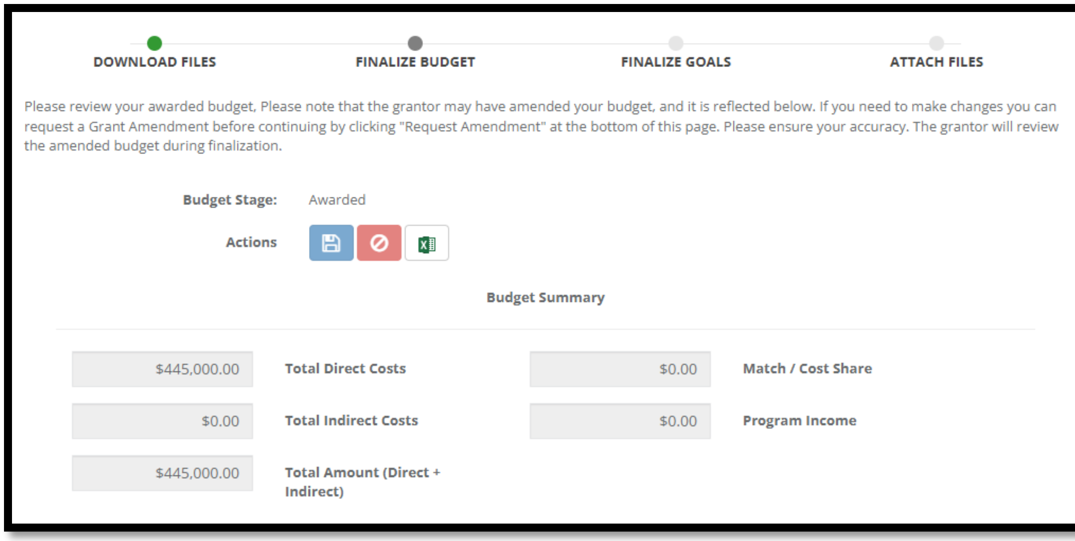
2) Log into Portal and click My Awards on the left side menu. Click on the appropriate Award title, or from the Actions column, select Accept/Decline Award:



3) On the Award Acceptance page, download and view any files from the Actions column. Then, click *Continue*:



4) Review and finalize your budget. Your granting agency may not have awarded you the exact amount you requested. You can request changes if you believe the budgeted items are justified:

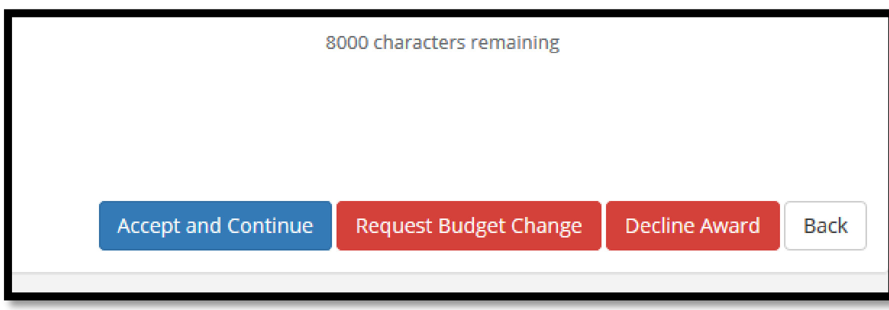


5) You can include a narrative in the budget to further explain and justify your expenses. When you are ready to finalize your budget click on "Save Changes."

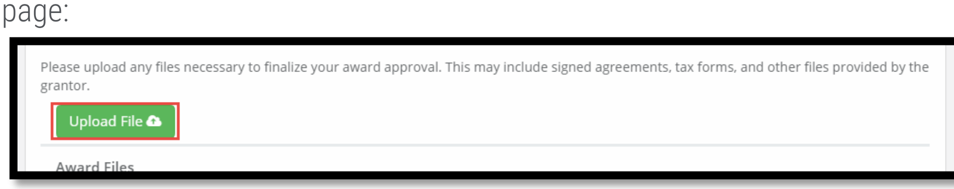
6) Select "Accept and Continue" at the bottom of the page.

If you plan to decline your award offer, click "Decline Award."

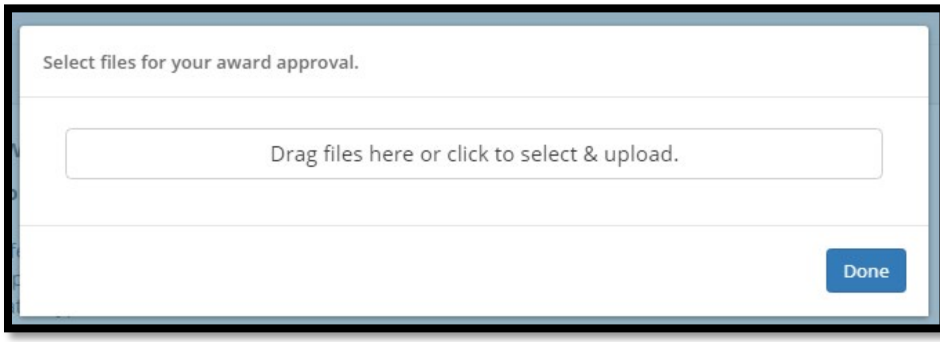
If you would like to request a budget change before accepting, click "Request Budget Change." This will send a request to the Grantor, and you should expect an updated Award Notification to accept:



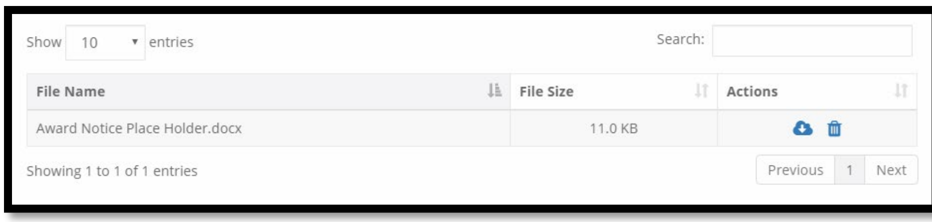
7) If you need to attach files to accept the award, select Upload Files on the following page:



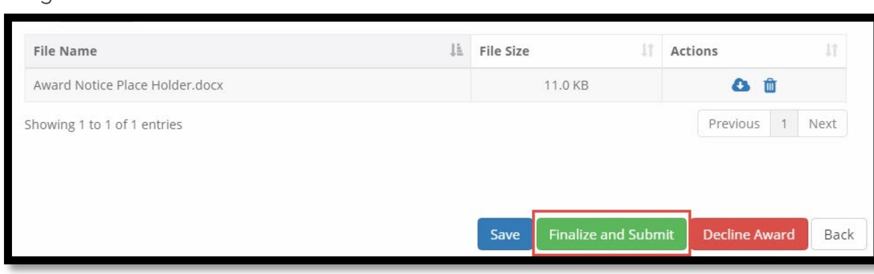
Files can be attached by selecting them from your File Explorer or dragging and dropping files from your File Explorer to the browser:



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

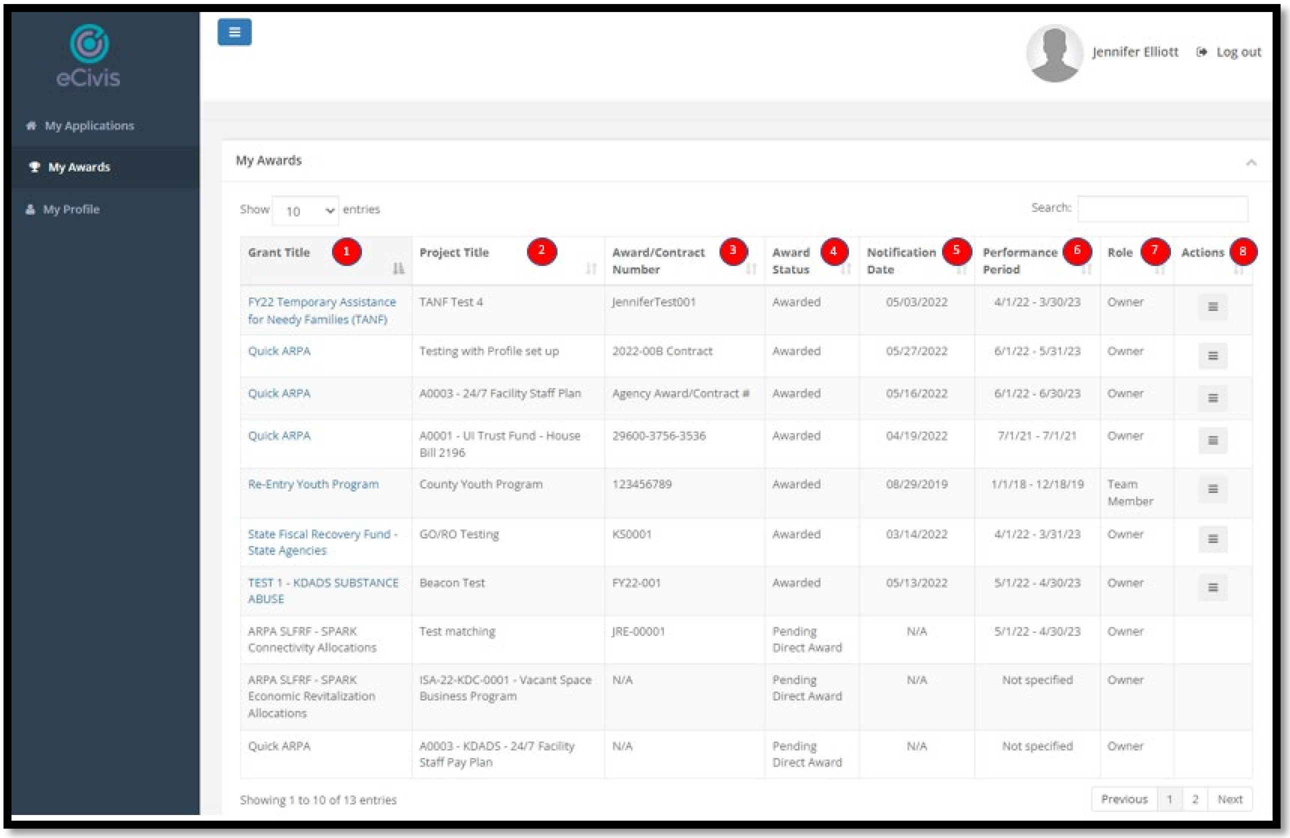


8) Select *Finalize and Submit* to send the Program Administrator notification that you have accepted the award. You can also leave an optional note to the grantor and Program Administrator:



4. Accessing Your Awards

Access to all of your awards and their financial history is available from the My Awards option from the navigation bar.



1. **Grant Title**: Name of the program.

2. **Project Title**: Name of the project identified by the Grantor.

3. **Award/Contract Number**: The unique award or contract number specific to this award.

4. **Award Status**:
   - Awarded: You have accepted the award.
   - Pending Acceptance: The award is waiting for you to accept or decline it.

5. **Notification Date**: The date the Grantor reviewed and approved your award.

6. **Performance Period**: The project period as specified by the Grantor.

7. **Role**:
   - **Owner**: You were identified as the point of contact during the MOU process; lead agency

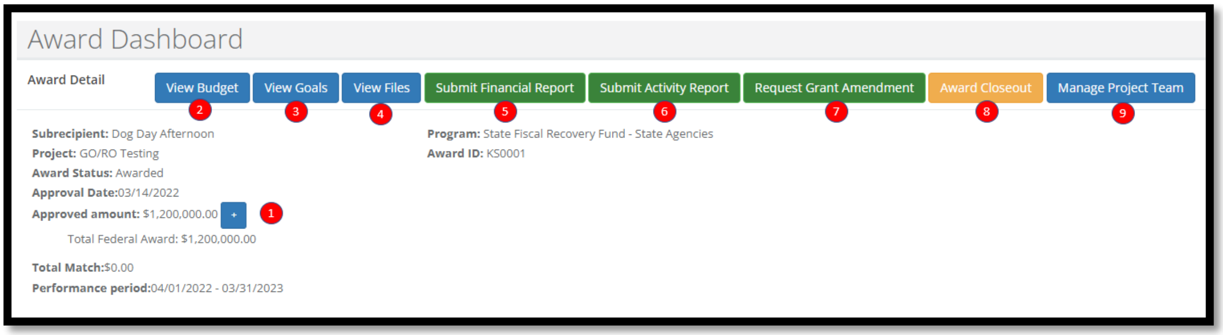
team member.
- **Team Member**: The owner has added you to help track the award and submit reports.

8. **Actions**: Varies by award status:
   - **Awarded**: Manage Award
   - **Pending Acceptance**: Accept/Decline Award

5. Navigating your Award Management Tools

You can click on each grant title to access its Award Dashboard. The Award Dashboard contains: Award Detail, Pending Tasks, Award Activity, and Award Amendments.

5.1. Award Detail Section



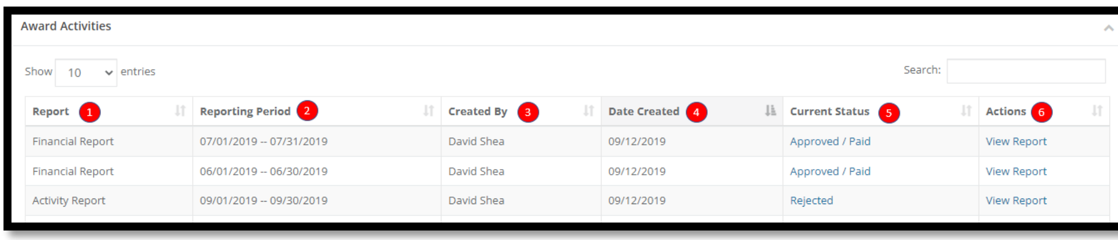
1. Click + to view Funding Details.
2. **View Budget**: View your budget.
3. **View Goals**: View your project goals.
4. **View Files:** The grantor has attached the following files for you to download and view.
5. **Submit Financial Report**: Submit a new Financial Report.
6. **Submit Activity Report**: Submit a new Activity Report.
7. **Request Grant Amendment**: Request a grant amendment.
8. **Award Closeout**: Prepare for award closeout.
9. **Manage Project Team**: View team members who also have access to the Award Dashboard and can submit reports. Team members can be added and removed using this button. This button will only appear for Owners of the award.

5.2. Pending Tasks Section

1. **Task Type**: Financial & Activity Reports, Closeout Approval, and Misc. Tasks.
2. **Date Created**: The date when your task was created.
3. **Due Date**: When your report is due.
4. **Actions**: Submit the report or mark as complete.

5.3. Award Activities Section

These columns can be reorganized by clicking on the column headers:



Award Activities

Show 10 entries Search:

Report 1	Reporting Period 2	Created By 3	Date Created 4	Current Status 5	Actions 6
Financial Report	07/01/2019 -- 07/31/2019	David Shea	09/12/2019	Approved / Paid	View Report
Financial Report	06/01/2019 -- 06/30/2019	David Shea	09/12/2019	Approved / Paid	View Report
Activity Report	09/01/2019 -- 09/30/2019	David Shea	09/12/2019	Rejected	View Report

1. **Report**: Type of report.
2. **Reporting Period**: Date range of items in the report.
3. **Created by**: Team member who submitted the report.
4. **Date Created**: Date on which the report was saved.
5. **Current Status**:

   - **Approved/Awaiting Payment**: The Grantor has approved the report but has not submitted payment.

   - **Approved//Paid**: The Grantor has approved the report and submitted the reimbursement.

   - **Rejected**: The Grantor needs more information.

   - **Pending Approval**: The report has been submitted, and there has been no action by the Grantor.

6. **Actions**:

- **Review/Resubmit**: If a report has been rejected, the applicant will have the opportunity to edit the rejected report and resubmit it.

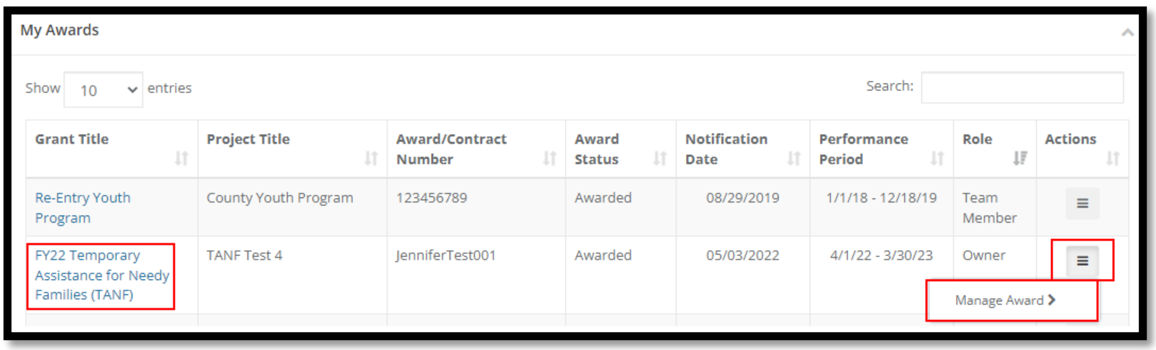
6. Manage Project Team

There are two types of user roles in the portal Owner and Team Member. The Owner is the point of contact who receives the direct award notification, completes the initial set up and is the only user who can add a Team Member. A Team Member can be added at any time after initial set up.

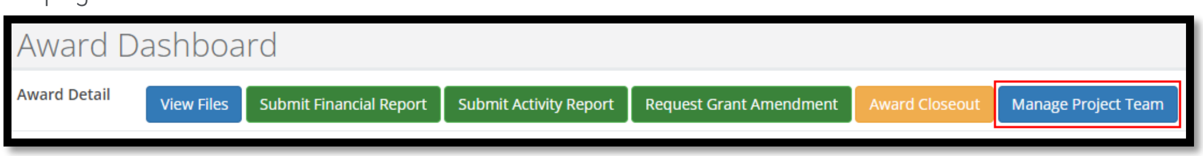
Team members cannot add additional team members, only the Owner has that ability. Team member can perform all other functions related to the direct award.

NOTE: *Please reach out to your Grantor if a new Owner needs to be assigned to your award*. See 6.1 for more information.

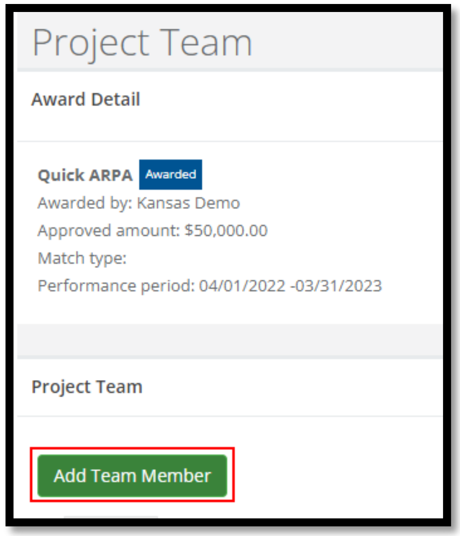
1) From My Awards, locate the Grant Title where you are an Owner, and where team members will need to be added. Either select the Grant Title or click the box under Actions, then click on "Manage Award".



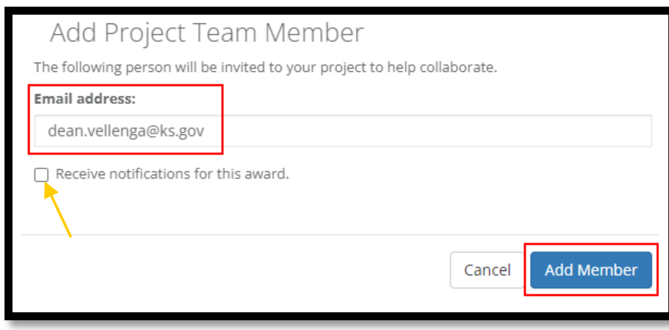
2) Select "Manage Project Team" from the options listed at the top of the Award Dashboard page.



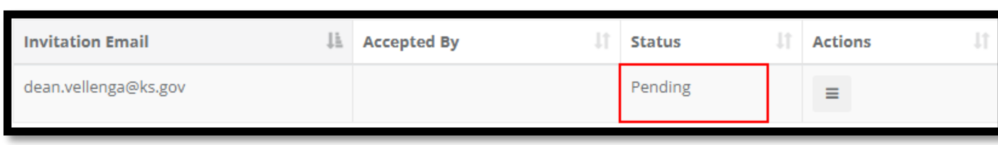
3) On the Project Team page, select "Add Team Member."



4) A pop-up box appears, Add Project Team Member, enter the email address of your team member. Click “Add Member.” To proactively set email notifications for the Team Member, select the Receive notifications for this award option.



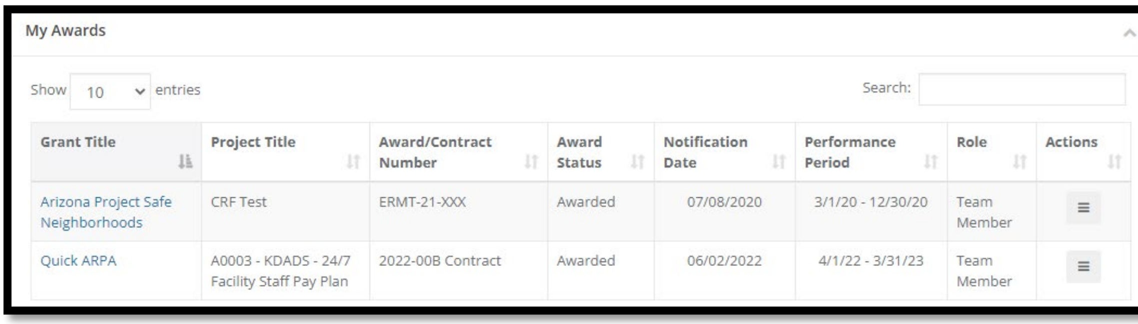
5) Under Invitation Email, the team member has a Pending status, and an email has been sent to the newly added team member. With a Pending status, the Actions available to the Owner are Resend Invitation, Delete Invitation or Add Award Notifications.



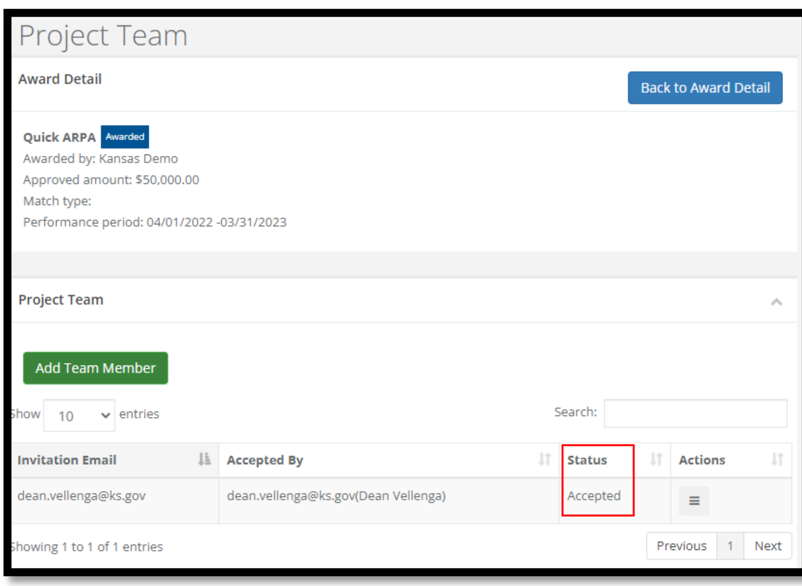
Invitation Email	Accepted By	Status	Actions
dean.vellenga@ks.gov		Pending	≡

6) The recipient of the email must click on the link to access the eCivis Portal. If they are new to the portal, they will be instructed to create an account, otherwise, they will log in to complete the process.

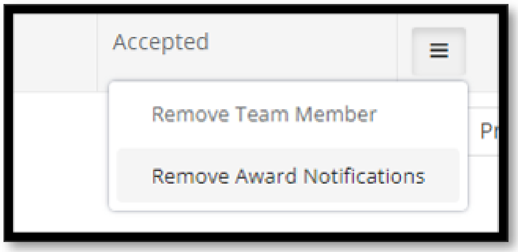
7) After confirming the invitation, the grant award appears under the Team Member's My Awards with a Role of Team Member.



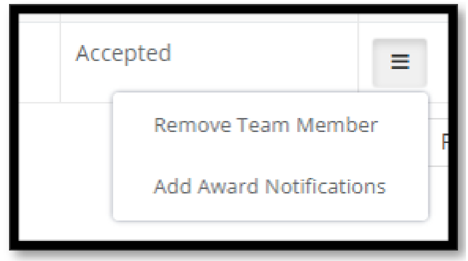
8) On the Project Team page, the Status is Accepted.



9) To manage email preferences for the Team Member, click on Actions and the option to either Add Award notifications or Remove Award notifications will appear.



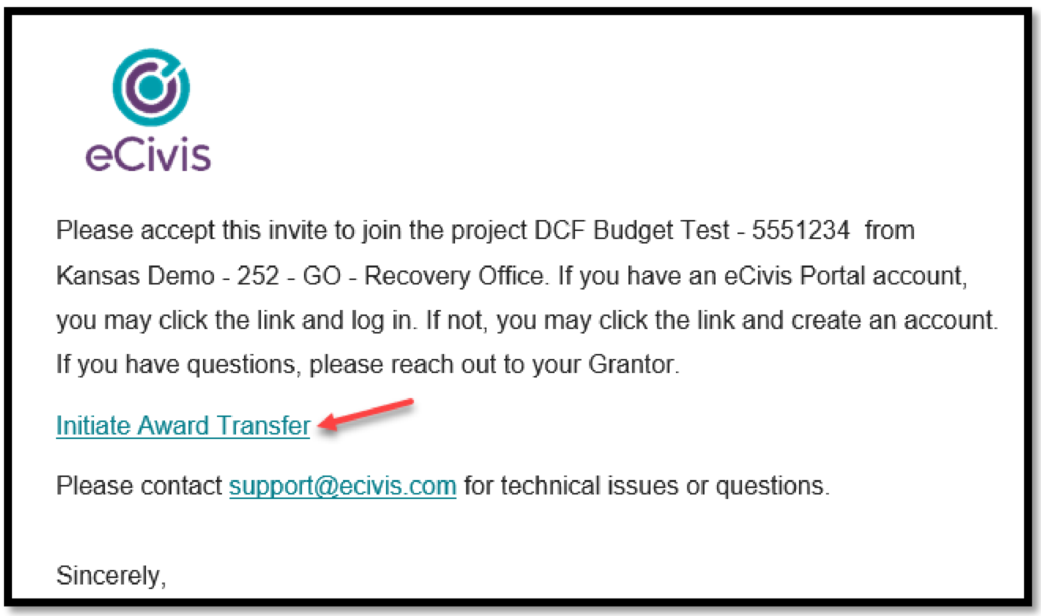
OR



6.1 Accept Transfer Award Ownership

When a new award owner is assigned, the Grantor will make the change of ownership in eCivis. An email will be generated to the new Owner confirming the new project/award.

To accept the transfer of ownership, click the link labeled Initiate Award Transfer.



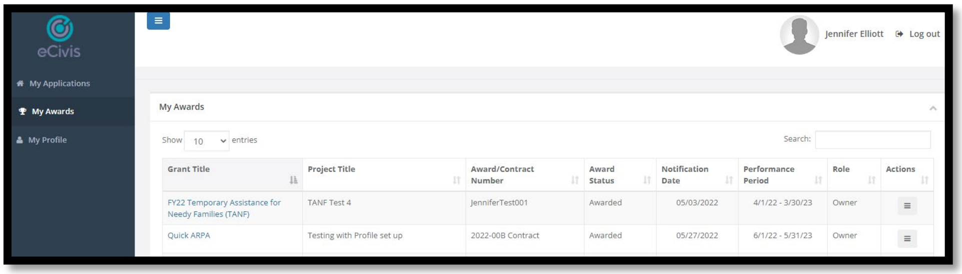
NOTE: If the new Owner does not have an eCivis Portal account, best practice is to first create the account, then return to the email link to accept the transfer of ownership. See 1. Creating an Account for more information.

7. Submitting Reports to the Grantor

7.1. Submitting Financial Reports

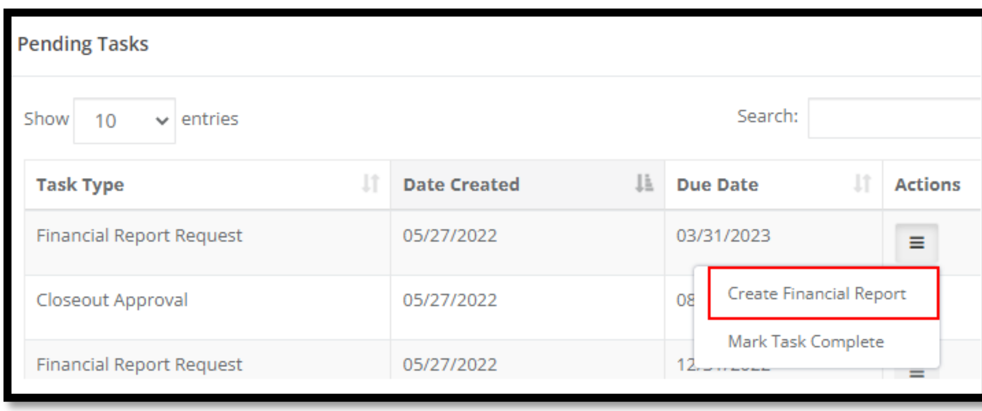
From the Award Dashboard, you can submit a Financial Report directly to the Grantor.

1) Select "My Awards" from the navigation bar then select the Grant Title or under Actions, click "Manage Award" to display the Award Dashboard.

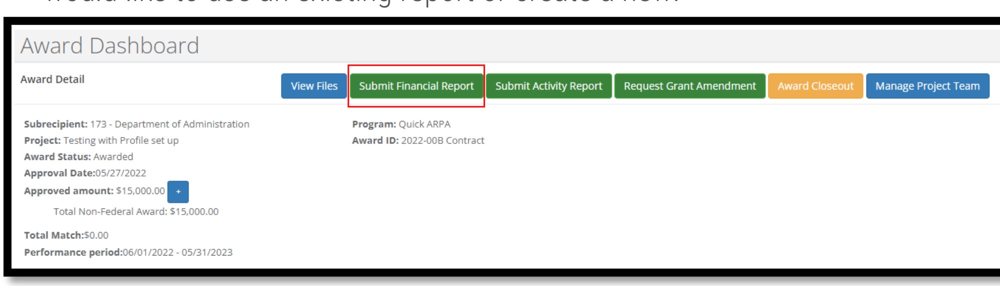


2) You can submit a financial report by selecting an existing report under Pending Tasks by clicking on Actions, then "Create Financial Report", or by clicking on "Submit Financial Report". Using an existing pending task should be used by default.

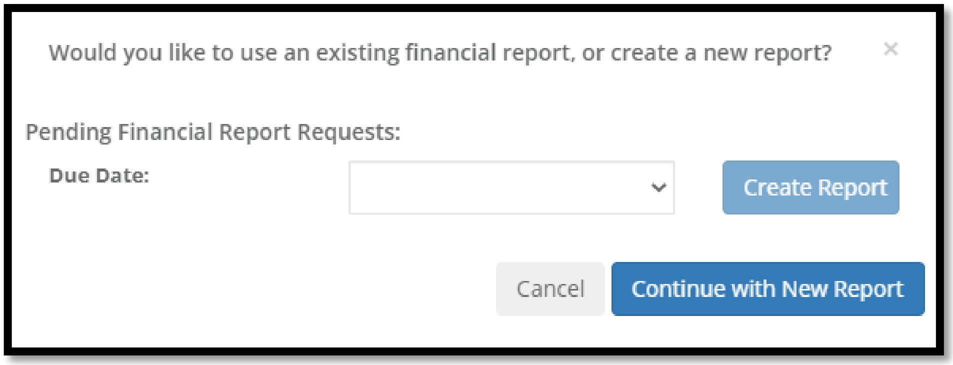
   a. Selecting an existing reporting task, click on Actions, then "Create Financial Report".



   b. Selecting "Submit Financial Report", a pop-up box appears, confirming if you would like to use an existing report or create a new.

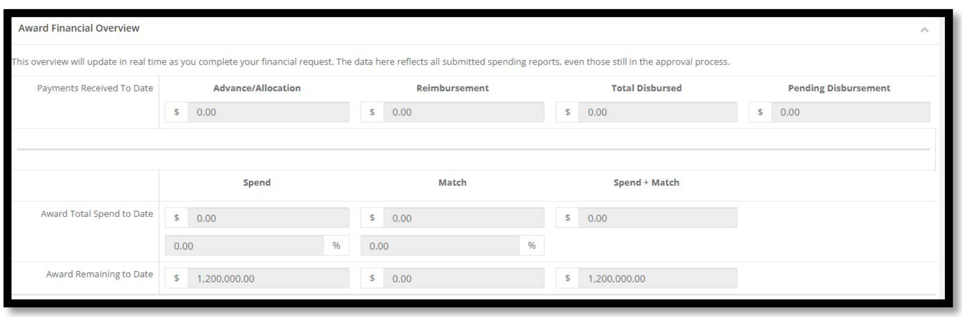


You may select a pending report by clicking on the Due Date drop-down.

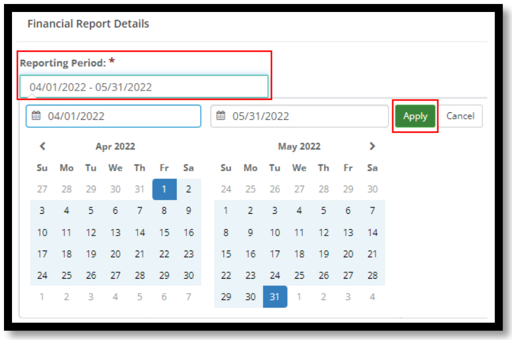


3) The Award Detail provides a summary of the award information:

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.

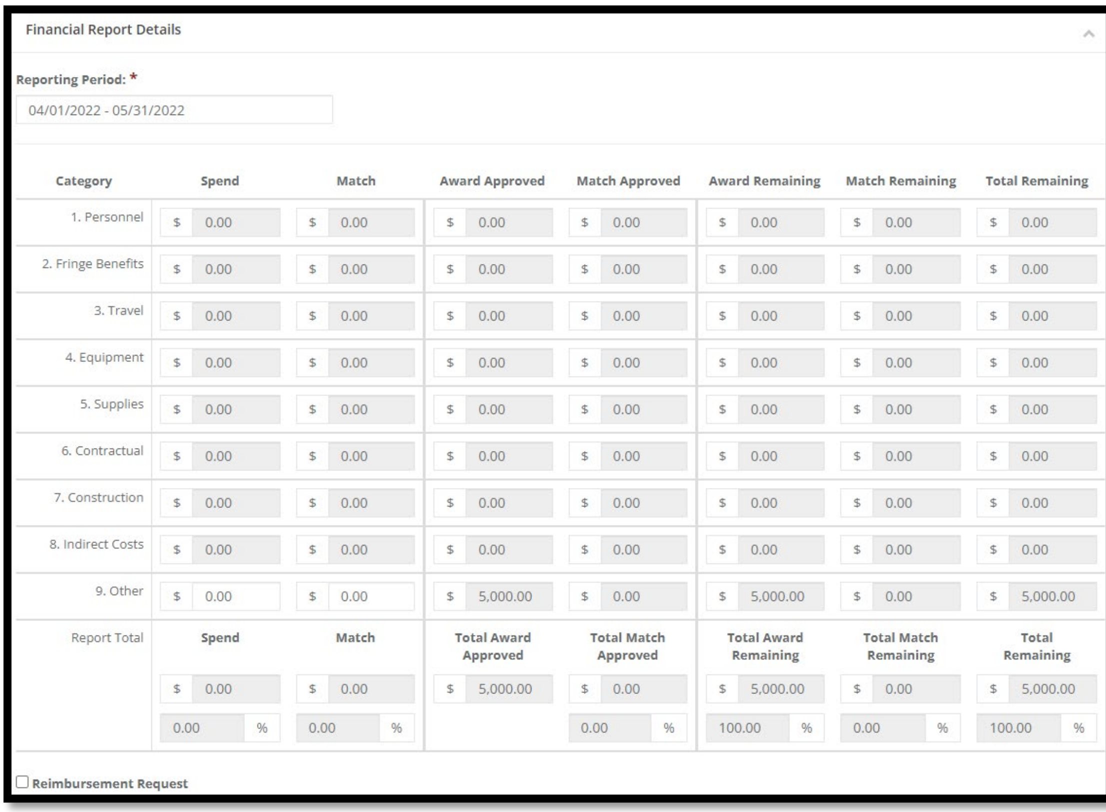


4) In the Financial Report Details, click inside the Reporting Period text box and provide the dates of the reporting period then click "Apply."



5) Enter the amounts in the appropriate category under the Spend and Match columns. Spend is the amount of grant funds spent during the reporting period. Match is the amount of match funds spent when applicable.

The “Other” category is where your funds appear on the agreed upon budget.



Financial Report Details

Reporting Period: *

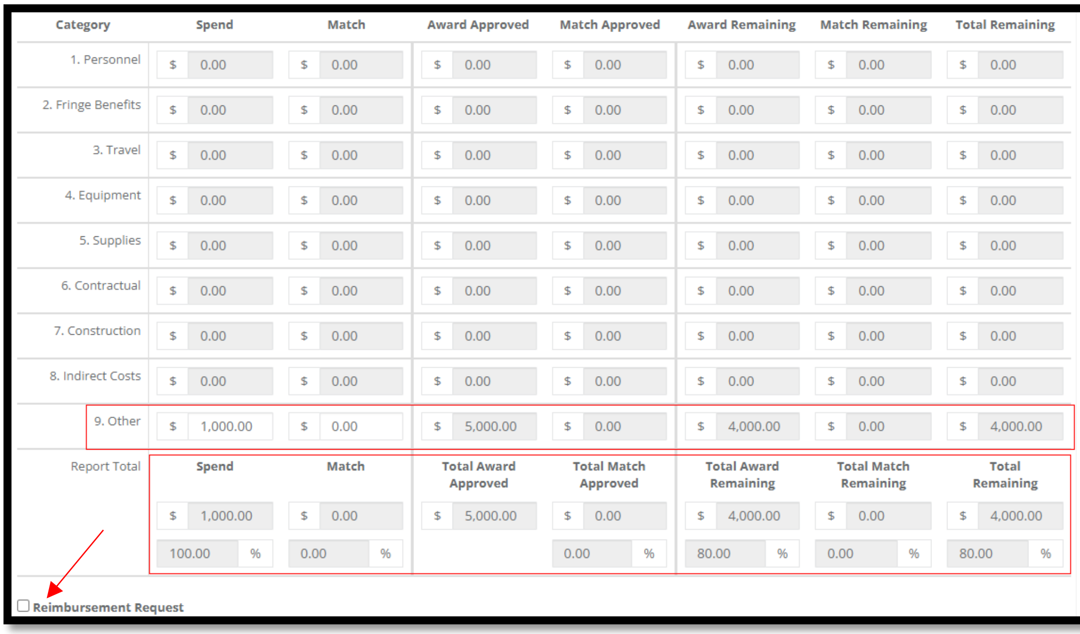
04/01/2022 - 05/31/2022

Category	Spend	Match	Award Approved	Match Approved	Award Remaining	Match Remaining	Total Remaining
1. Personnel	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
2. Fringe Benefits	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
3. Travel	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
4. Equipment	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
5. Supplies	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
6. Contractual	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
7. Construction	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
8. Indirect Costs	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
9. Other	$ 0.00	$ 0.00	$ 5,000.00	$ 0.00	$ 5,000.00	$ 0.00	$ 5,000.00
Report Total	Spend	Match	Total Award Approved	Total Match Approved	Total Award Remaining	Total Match Remaining	Total Remaining
	$ 0.00	$ 0.00	$ 5,000.00	$ 0.00	$ 5,000.00	$ 0.00	$ 5,000.00
	0.00 %	0.00 %		0.00 %	100.00 %	0.00 %	100.00 %

☐ Reimbursement Request

6) The “Award Approved”, “Match Approved”, “Award Remaining”, “Match Remaining” and “Total 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.

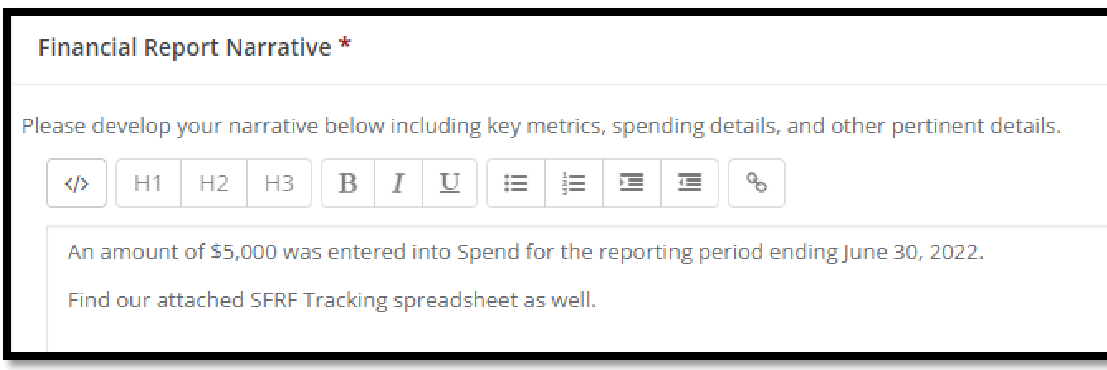
Note: If the financial report is for a expenses that require reimbursement, click the "Reimbursement Request" option.



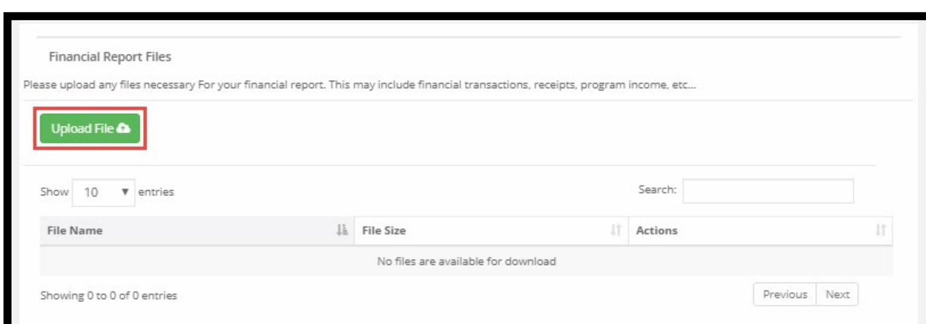
Category	Spend	Match	Award Approved	Match Approved	Award Remaining	Match Remaining	Total Remaining
1. Personnel	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
2. Fringe Benefits	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
3. Travel	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
4. Equipment	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
5. Supplies	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
6. Contractual	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
7. Construction	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
8. Indirect Costs	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
9. Other	$ 1,000.00	$ 0.00	$ 5,000.00	$ 0.00	$ 4,000.00	$ 0.00	$ 4,000.00
Report Total	Spend	Match	Total Award Approved	Total Match Approved	Total Award Remaining	Total Match Remaining	Total Remaining
	$ 1,000.00	$ 0.00	$ 5,000.00	$ 0.00	$ 4,000.00	$ 0.00	$ 4,000.00
	100.00 %	0.00 %		0.00 %	80.00 %	0.00 %	80.00 %

☐ Reimbursement Request

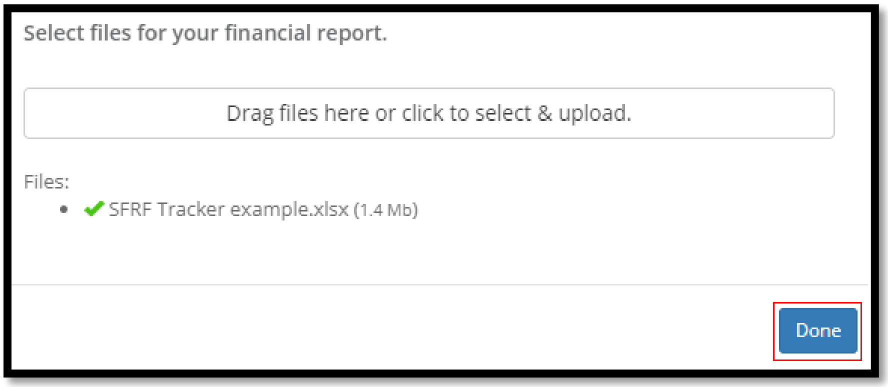
7) The Financial Report Narrative is required and should be used to communicate any information regarding the financial report to the Grantor. See Appendix B for possible scenarios and suggested language to provide.



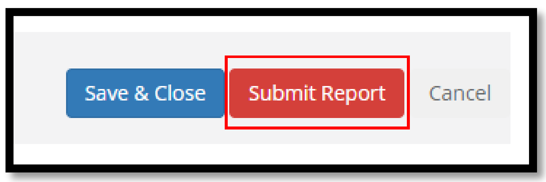
8) To upload documentation required by the Grantor, click on "Upload File" to attach a document.



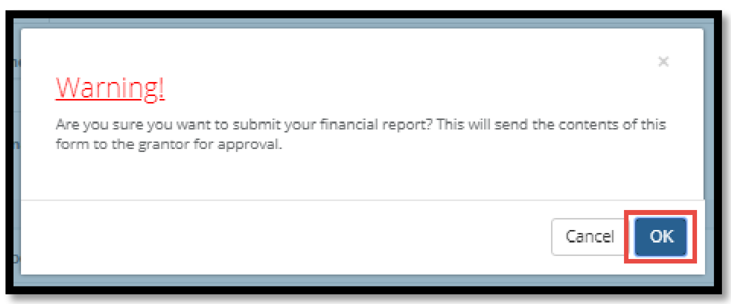
In the pop-up box, either drag a file or browse and upload. Once the file has successfully been attached, click "Done".



9) When you are finished, click "Submit Report." You also have an opportunity to save your report and complete it later.



10) Click on the warning page to send the report to the Grantor.



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

Award Activities

Show 10 entries Search:

Report	Reporting Period	Created By	Date Created	Current Status	Actions
Financial Report	04/01/2022 -- 04/15/2022	Jennifer Elliott	05/10/2022	Approved / Paid	View Report
Financial Report	04/01/2022 -- 05/31/2022	Jennifer Elliott	06/03/2022	Pending Approval	View Report

Showing 1 to 2 of 2 entries Previous 1 Next

12) The Financial Report status will change, depending on the Grantor's actions:

Award Activities

Show 10 entries Search:

Report	Reporting Period	Created By	Date Created	Current Status	Actions
Financial Report	06/01/2019 -- 06/30/2019	David Shea	09/12/2019	Approved / Paid	View Report
Financial Report	04/01/2022 -- 05/31/2022	Jennifer Elliott	06/03/2022	Pending Approval	View Report
Activity Report	09/01/2019 -- 09/30/2019	David Shea	09/12/2019	Rejected	View Report
Financial Report	09/01/2020 -- 09/30/2020	David Shea	09/24/2020	Approved / Paid	View Report
Financial Report	09/01/2021 -- 09/30/2021	David Shea	09/27/2021	Approved	View Report

- **Pending Approval**: The Financial Report has not been reviewed.

- **Approved/Awaiting Payment**: The Financial Report has been reviewed and is waiting for payment.

- **Approved/Paid**: The reimbursement is complete.

- **Rejected:** Grantor has rejected.

13) Once approved and this report fulfills an assigned *Financial Report* task in your *Pending Tasks* table, click on the Actions icon next to that task and click "Mark Task Complete."

Pending Tasks

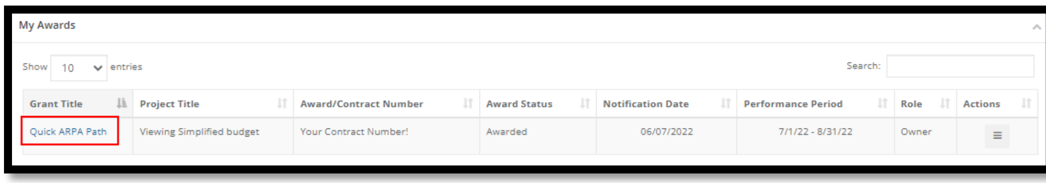
Show 10 entries Search:

Task Type	Date Created	Due Date	Actions
Financial Report Request	05/03/2022	04/15/2022	≡
Activity Report Request	05/03/2022	04/15/2022	Create Financial Report
Financial Report Request	05/03/2022	05/15/2022	Mark Task Complete

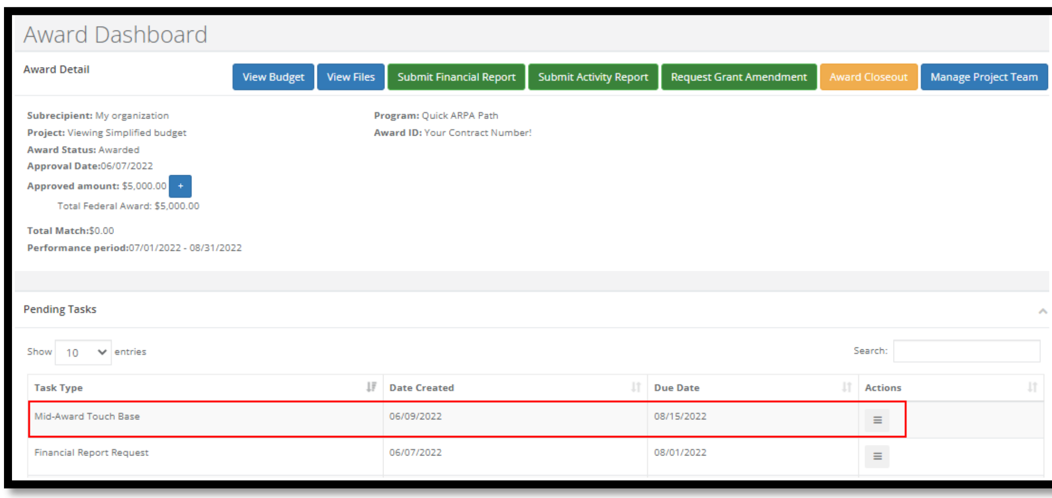
7.2. Submitting Miscellaneous Reports

Miscellaneous reports will not appear as a reoccurring or activity task, they will be ad hoc in nature. If the Grantor is requesting a miscellaneous report, it will be identified with a task name specific to the report requirements, i.e., “Project’s Annual Recovery Plan Narrative”.

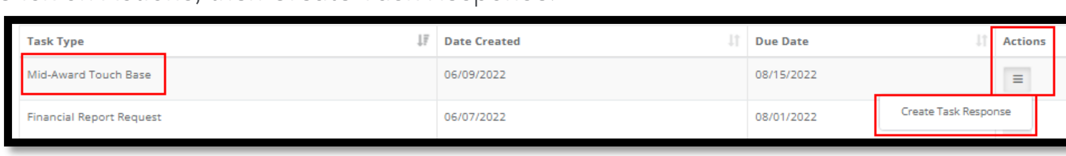
From “My Awards,” select the Grant Title of the award.



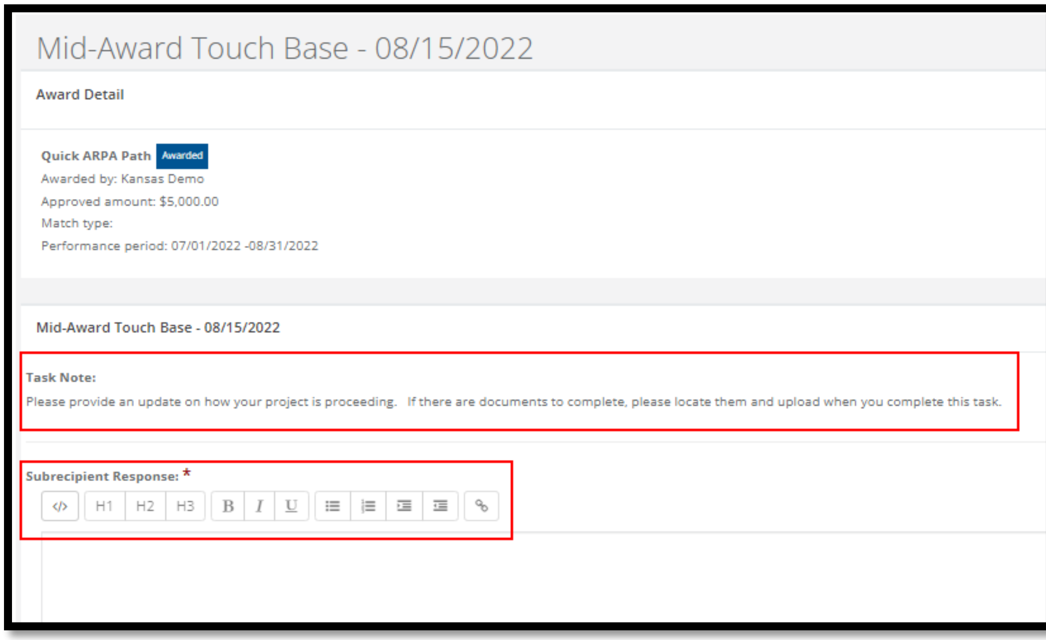
1) On the Award Dashboard, you must select the task identified by the Grantor.

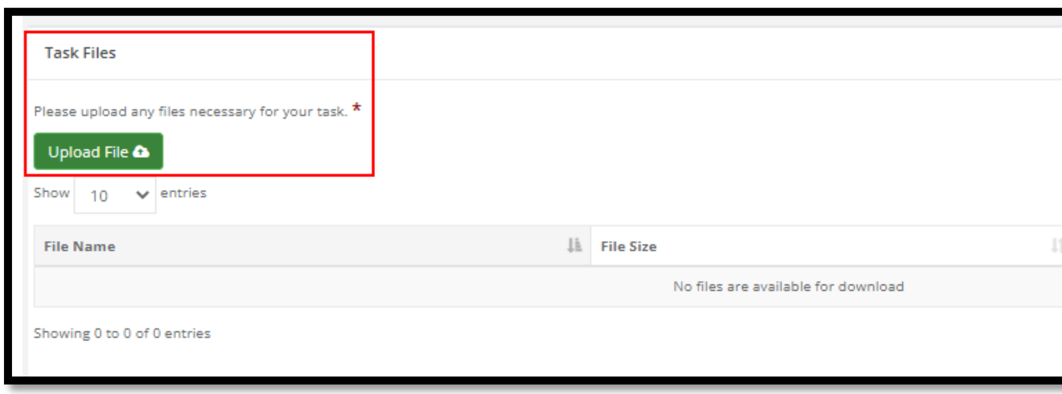


Click on Actions, then Create Task Response.

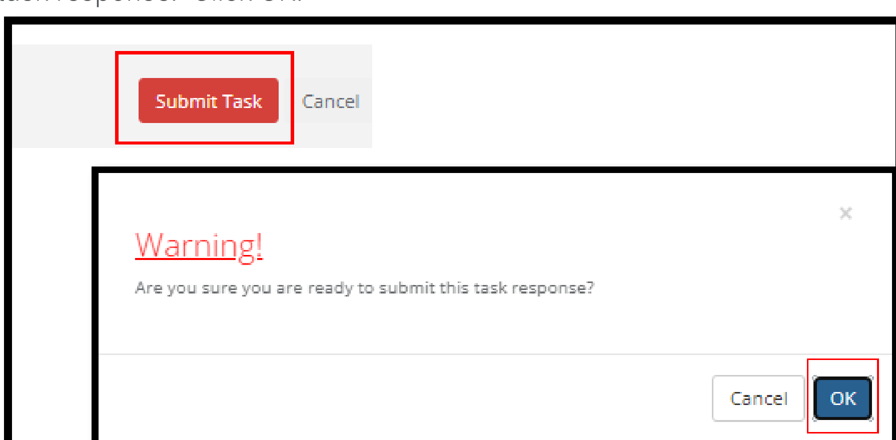


2) The Grantor will provide instruction in the Task Note section. Complete the required Subrecipient Response and attach any files requested.





3) When complete, click Submit Task. A pop-up box will appear to confirm submitting task response. Click OK.

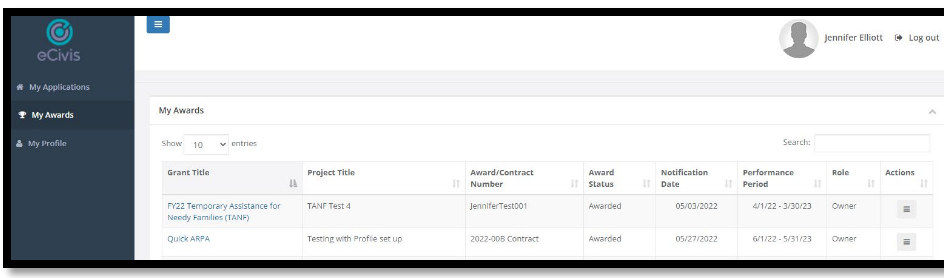


4) The miscellaneous report will appear under your Award Activities section. Once approved by the Grantor, the Current Status will become Approved.

7.3. Submitting Activity Reports

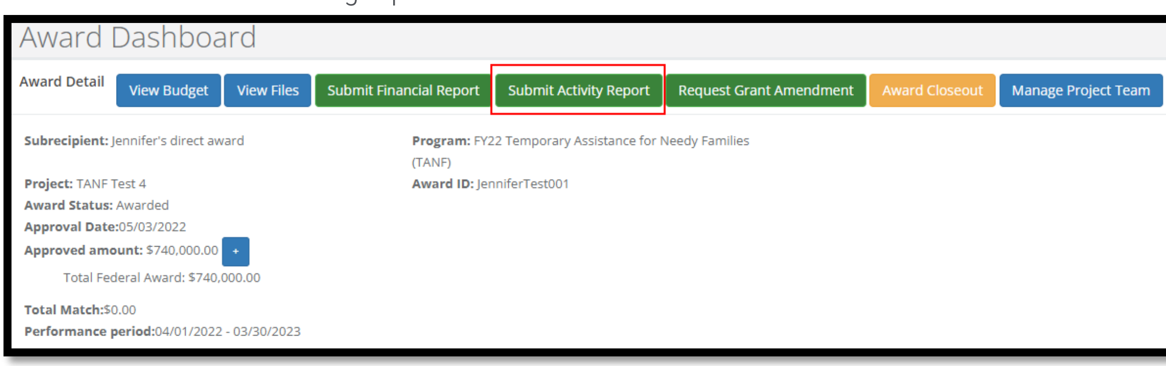
From the Award Dashboard, you can submit an Activity Report directly to the Grantor.

1) Select “My Awards” from the navigation bar then select the Grant Title or under Actions, click “Manage Award” to display the Award Dashboard.

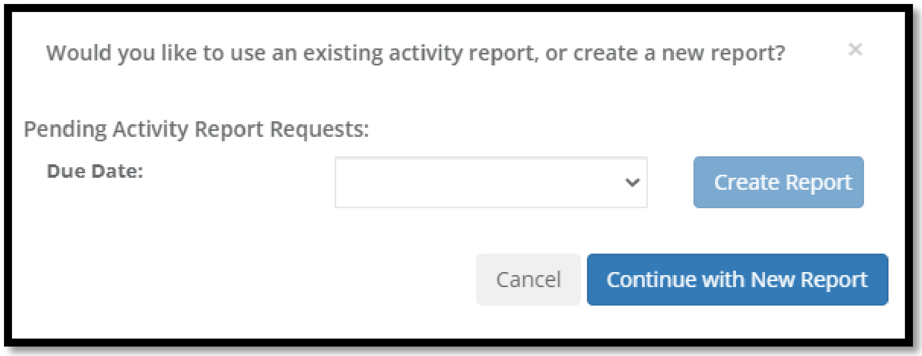


2) You can submit an activity report by clicking on “Submit Activity Report” or select an existing report under Pending Tasks by clicking on Actions, then “Create Activity Report”.

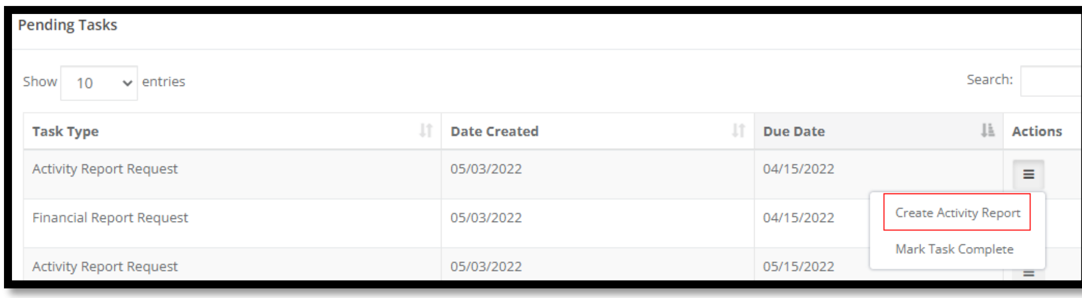
   1) Selecting “Submit Activity Report”, a pop-up box appears, confirming if you would like to use an existing report or create a new.



You may select a pending report by clicking on the Due Date drop-down.

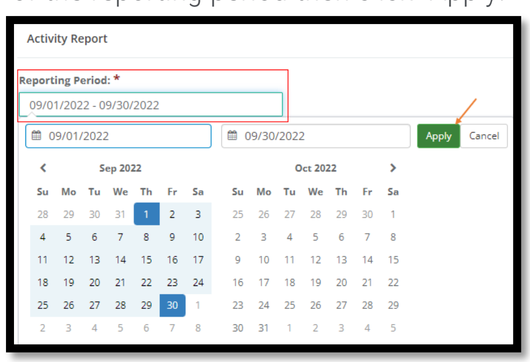


2) Selecting an existing reporting task, click on Actions, then "Create Activity Report".

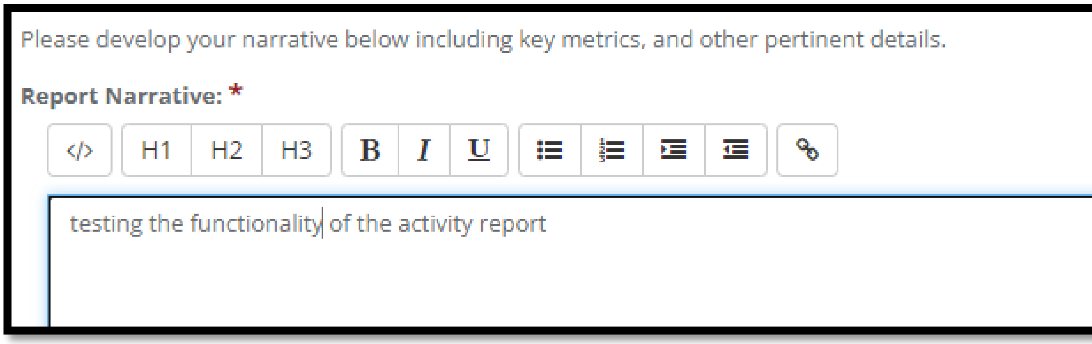


3) The Award Detail provides a summary of the award information:

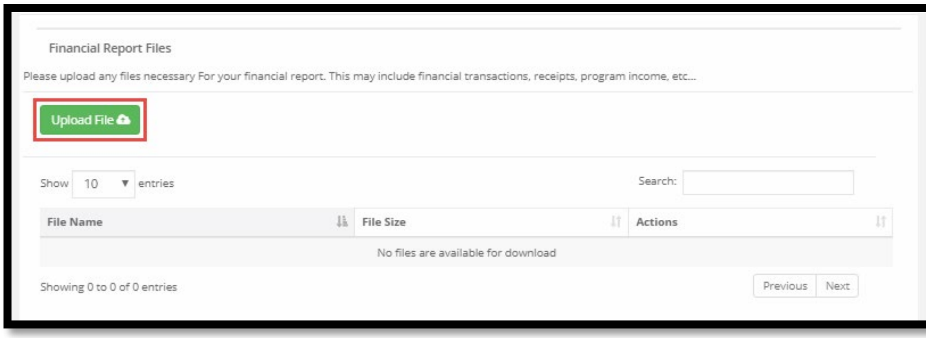
4) In the Activity Report details, click inside the Reporting Period text box and provide the dates of the reporting period then click "Apply."



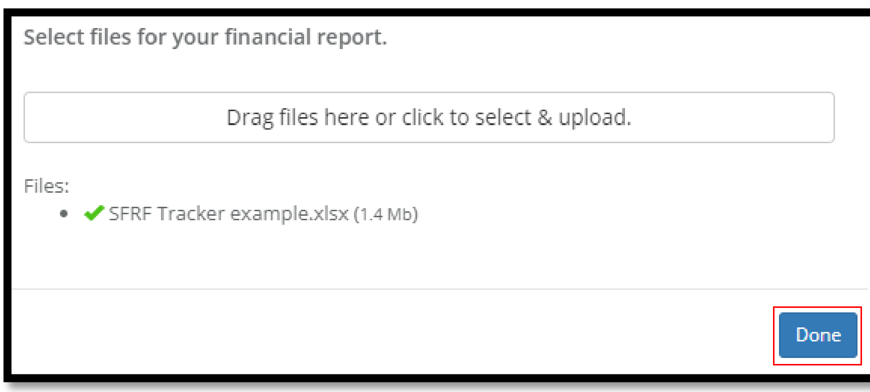
5) Enter all relevant information including key metrics, goals, etc. in the Report Narrative text box.



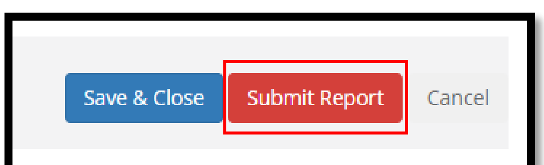
6) Upload any documentation required by the Grantor by clicking on the "Upload File" button.



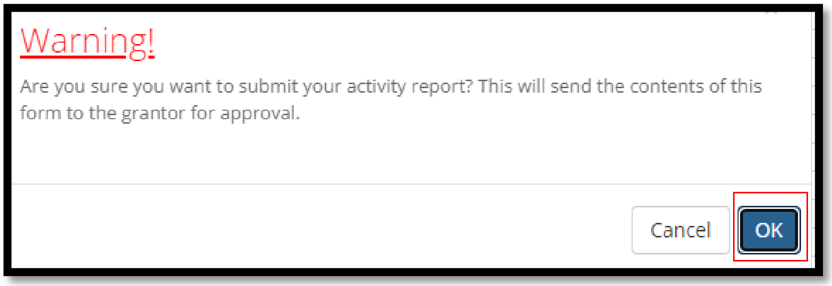
In the pop-up box, either drag a file or browse and upload. Once the file has successfully been attached, click "Done".



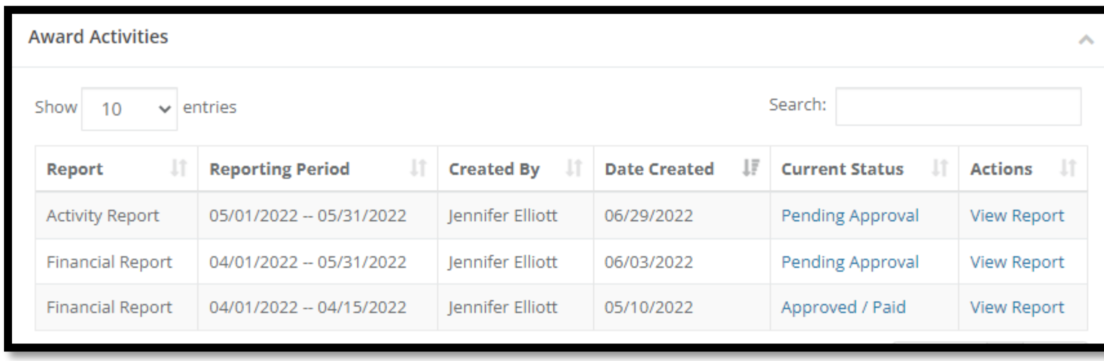
7) When you are finished, click "Submit Report." You also have an opportunity to save your report and complete it later.



8) Click on the warning page to send the report to the Grantor.



9) You will be taken back to the Award Detail page, where the Activity Report will now be recorded under the Award Activities:



Award Activities

Show 10 entries   Search:

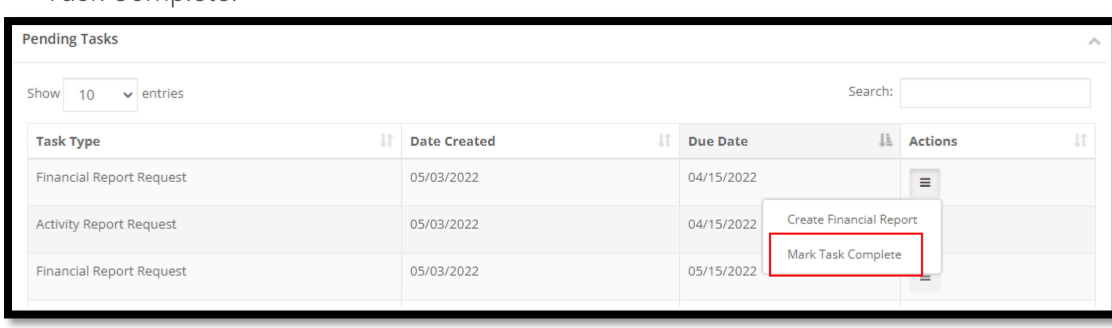
Report	Reporting Period	Created By	Date Created	Current Status	Actions
Activity Report	05/01/2022 -- 05/31/2022	Jennifer Elliott	06/29/2022	Pending Approval	View Report
Financial Report	04/01/2022 -- 05/31/2022	Jennifer Elliott	06/03/2022	Pending Approval	View Report
Financial Report	04/01/2022 -- 04/15/2022	Jennifer Elliott	05/10/2022	Approved / Paid	View Report

10) The Activity Report status will change, depending on the Grantor's actions:

Pending Approval: The Activity Report has not been reviewed.

Rejected: Grantor has rejected.

11) Once approved and this report fulfills an assigned Activity Report task in your Pending Tasks table, click on the Actions icon next to that task and click "Mark Task Complete."



Pending Tasks

Show 10 entries   Search:

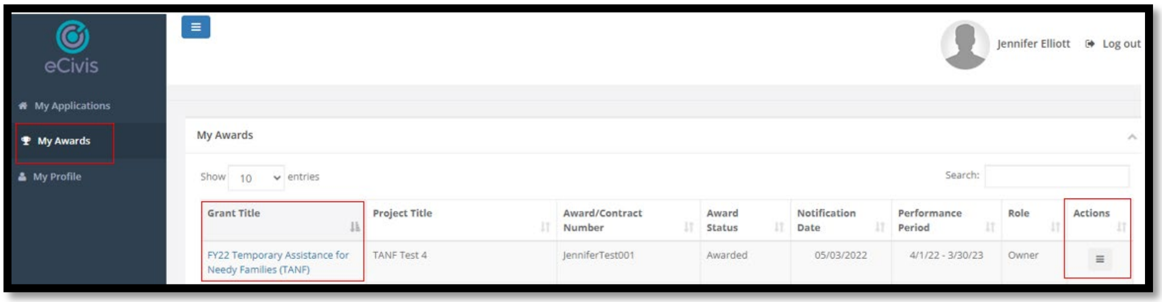
Task Type	Date Created	Due Date	Actions
Financial Report Request	05/03/2022	04/15/2022	≡
Activity Report Request	05/03/2022	04/15/2022	
Financial Report Request	05/03/2022	05/15/2022	≡

8. Grant Amendment

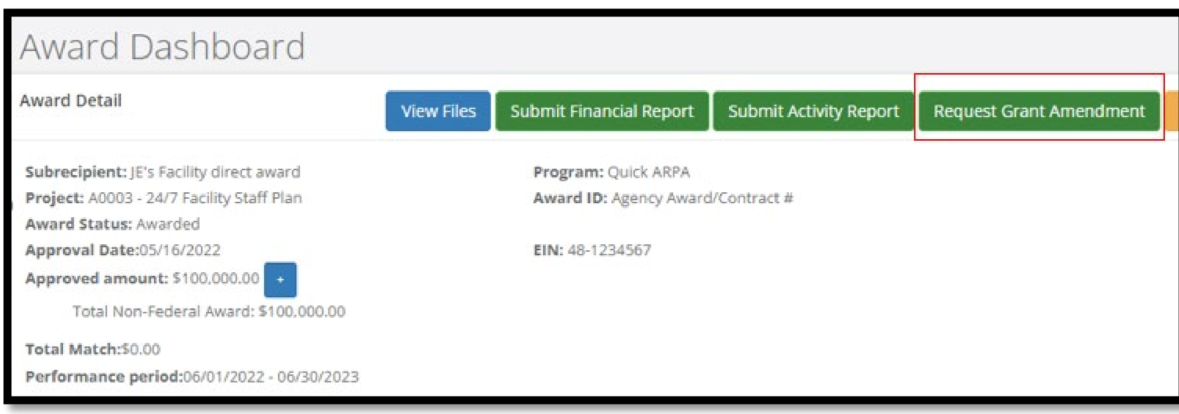
Either a Subrecipient or a Grantor can initiate a Grant Amendment. If an amendment is needed, please reach out to your Grantor prior to clicking the Request Grant Amendment button. The Grantor may prefer to initiate an amendment and use that process.

8.1. Subrecipient initiated Grant Amendment

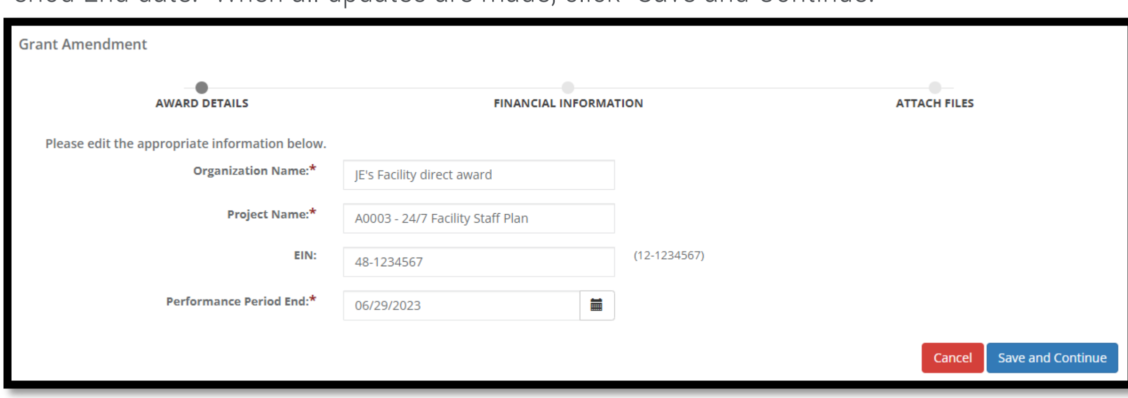
1) To submit a grant amendment, select "My Awards" from the navigation bar then select the Grant Title or under Actions, click "Manage Award" to display the Award Dashboard.



2) On the Award Dashboard, click on "Request Grant Amendment."

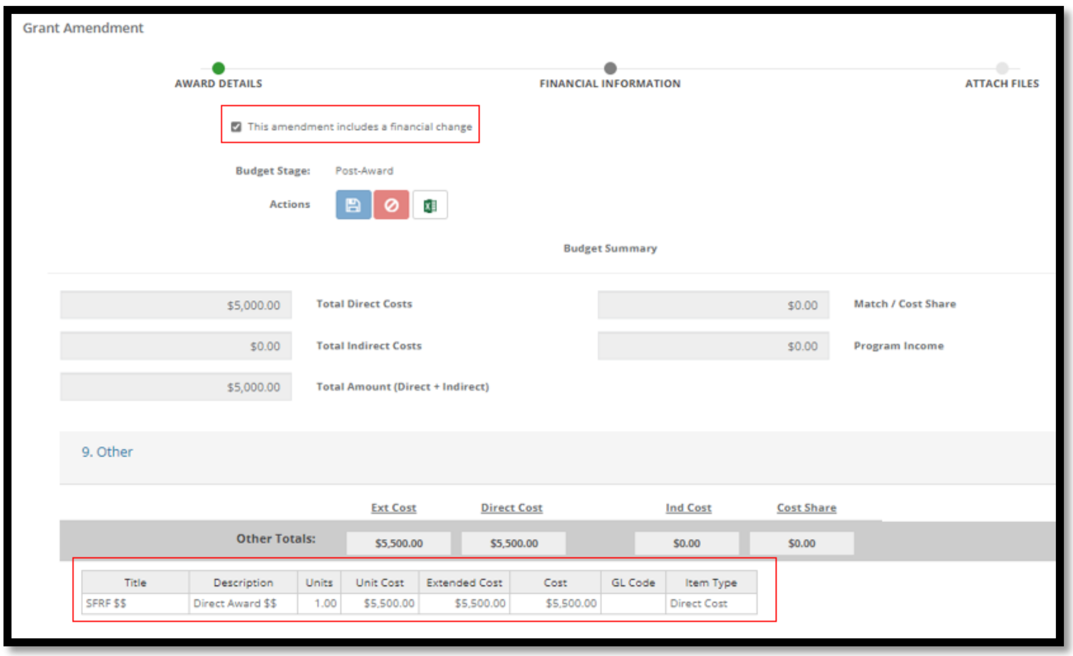


3) Any of the information in this section can be modified and will appear as an amendment. For example, if you would like to change the performance period, enter a new Performance Period End date. When all updates are made, click "Save and Continue."

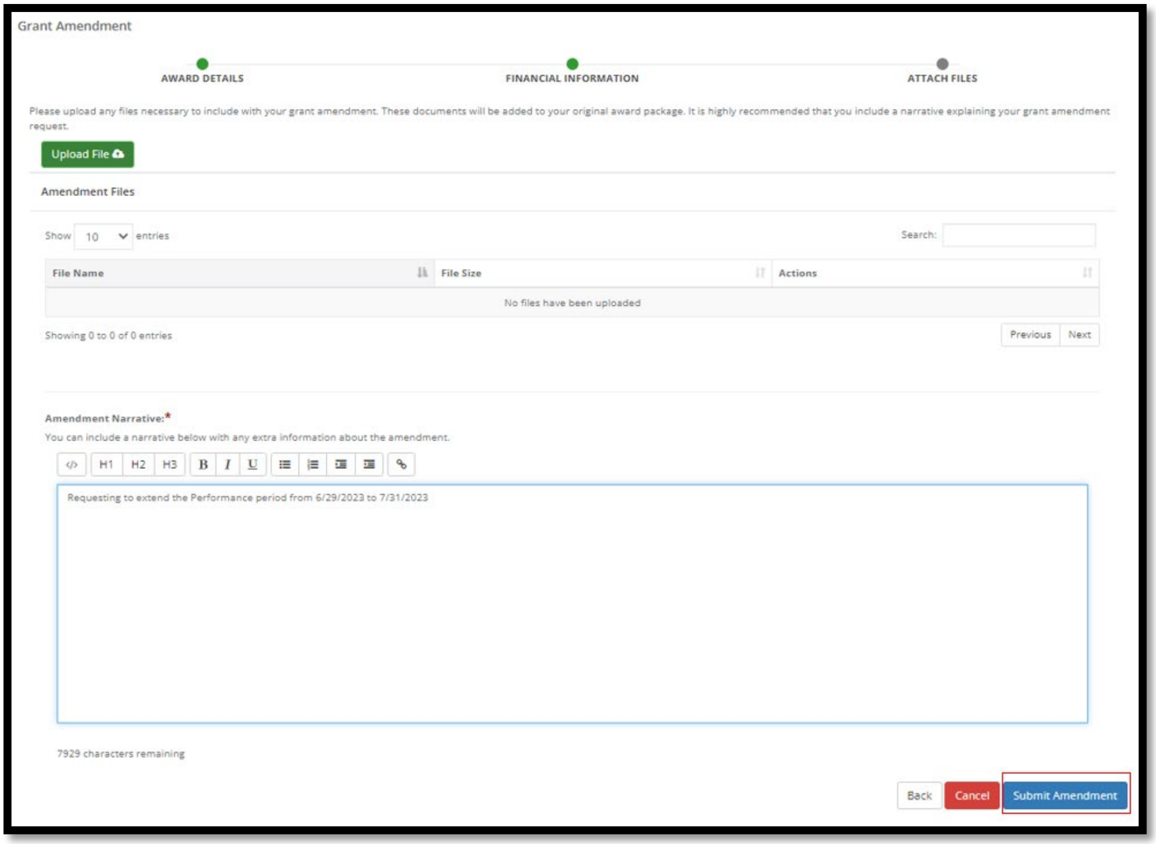


Financial grant amendments will have been discussed and agreed upon outside of the eCivis Portal.

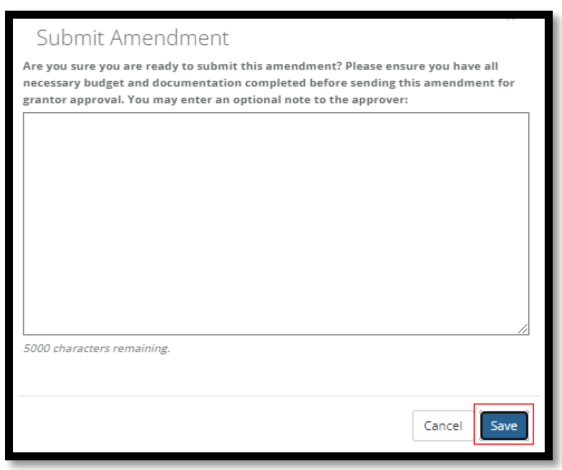
4) If applicable, check the “This amendment includes a financial change” box. This will allow you to adjust your budget that will be submitted for approval.



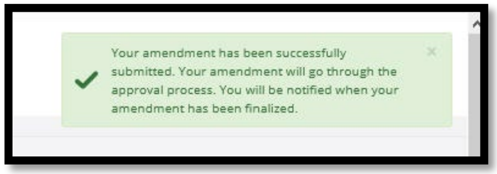
5) Upload any documentation needed to support the amendment by clicking the “Upload File” button, include additional notes/clarification in the narrative, and click “Submit Amendment.”



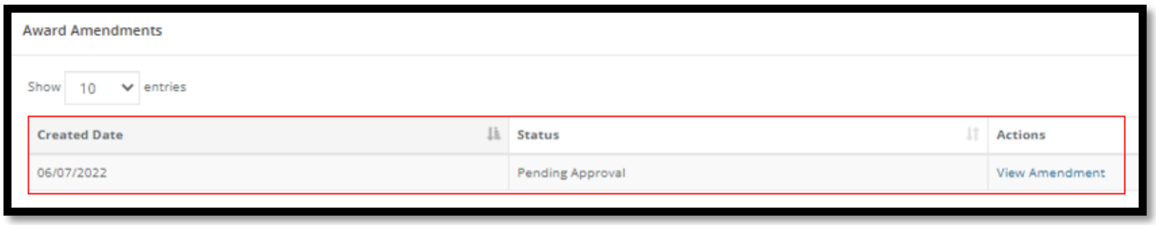
6) Include any final notes for the Grantor to consider and click “Save.”



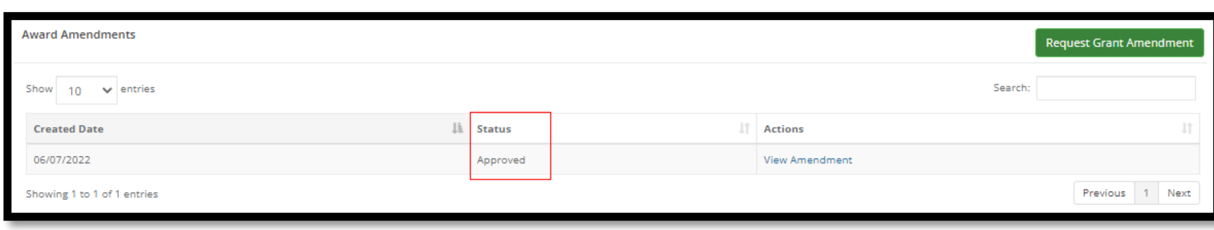
7) You will be notified that your amendment was successfully submitted.



8) You can locate the status of your Amendment in the Award Amendments section.

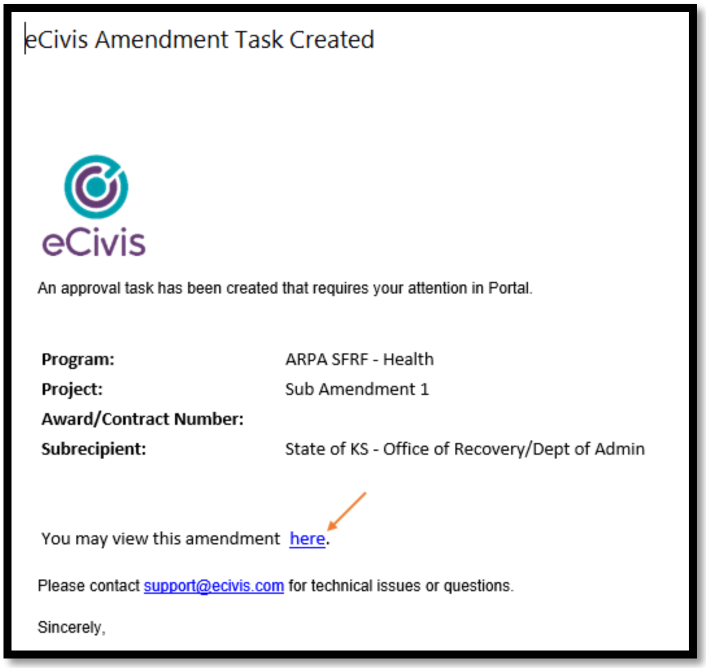


9) Once the Grantor approves the Grant Amendment, you will receive an email notification and will see the status change from Pending Approval to Approved.



8.2. Grantor initiated Grant Amendment

1) The process for the Grantor Amendment has fewer steps for the Subrecipient. Upon initial approval by the Grantor, an email is generated to the Subrecipient. Either click the link in the email or log in to the eCivis Portal and navigate to the Project/Award.



eCivis Amendment Task Created

eCivis

An approval task has been created that requires your attention in Portal.

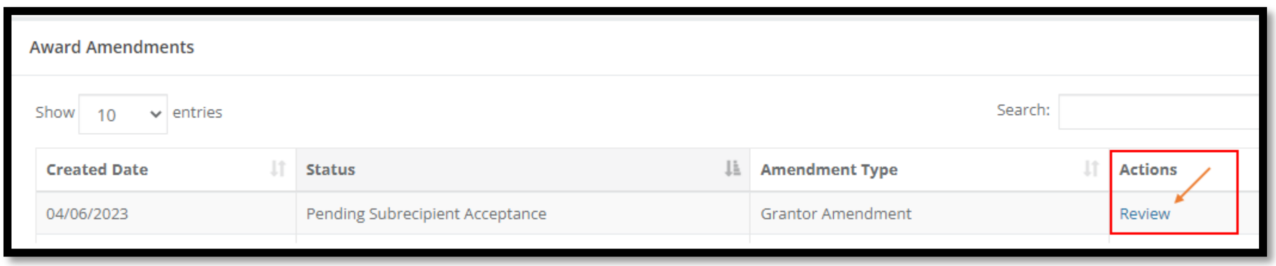
Program:	ARPA SFRF - Health
Project:	Sub Amendment 1
Award/Contract Number:	
Subrecipient:	State of KS - Office of Recovery/Dept of Admin

You may view this amendment here.

Please contact support@ecivis.com for technical issues or questions.

Sincerely,

2) Under the Award Amendments section, click "Review" under the Actions column.



Award Amendments

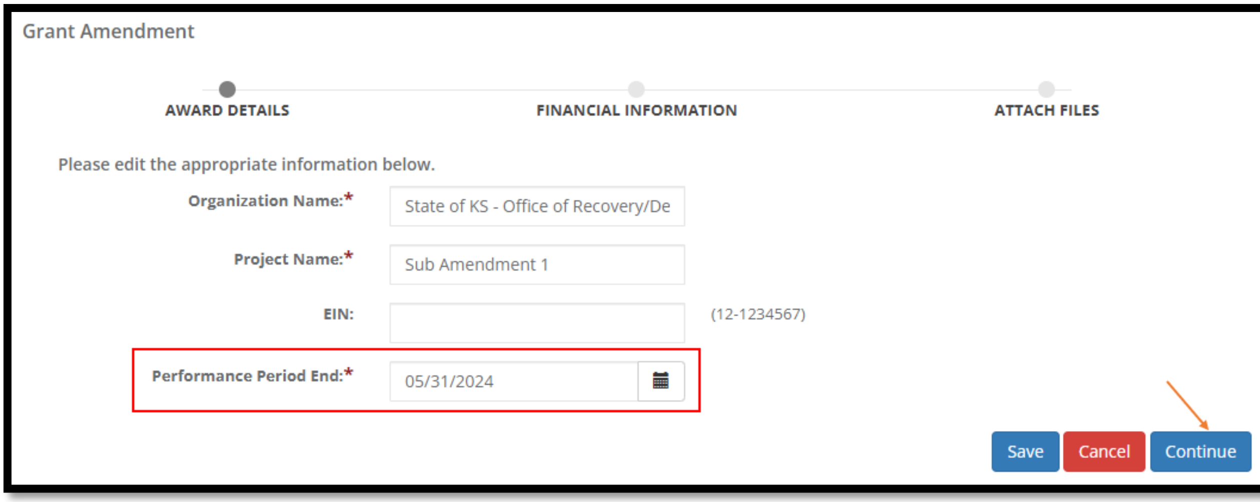
Show 10 entries Search:

Created Date	Status	Amendment Type	Actions
04/06/2023	Pending Subrecipient Acceptance	Grantor Amendment	Review

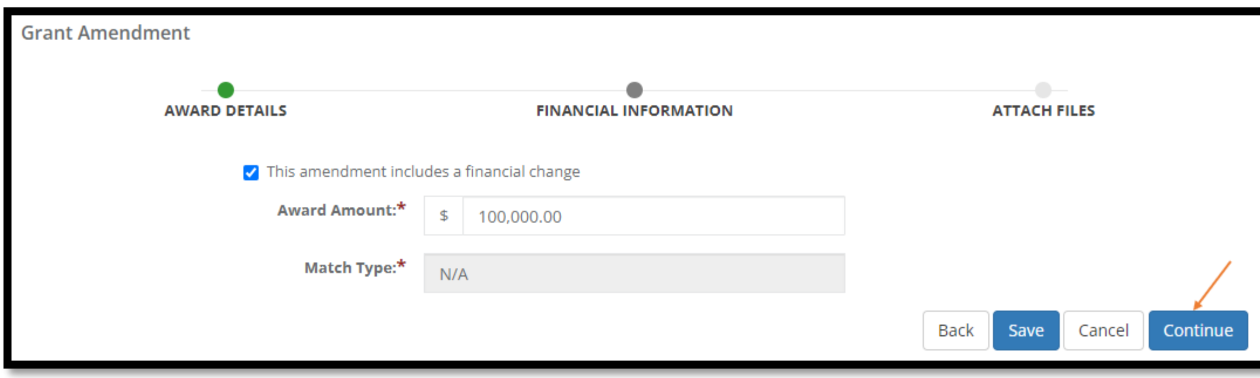
3) The acceptance process for an Amendment is similar to the process to accept an award. The Subrecipient will have a series of pages to view and continue to the next. The three main pages include Award Details, Financial Information and Attach Files. If the original award includes goals, Finalize Goals will be included in the Amendment process.

4) Award Details is the first page in the Grant Amendment acceptance. The Performance Period End date would be the only eligible data updated. If the Subrecipient agrees to the new end date, click the Continue button.

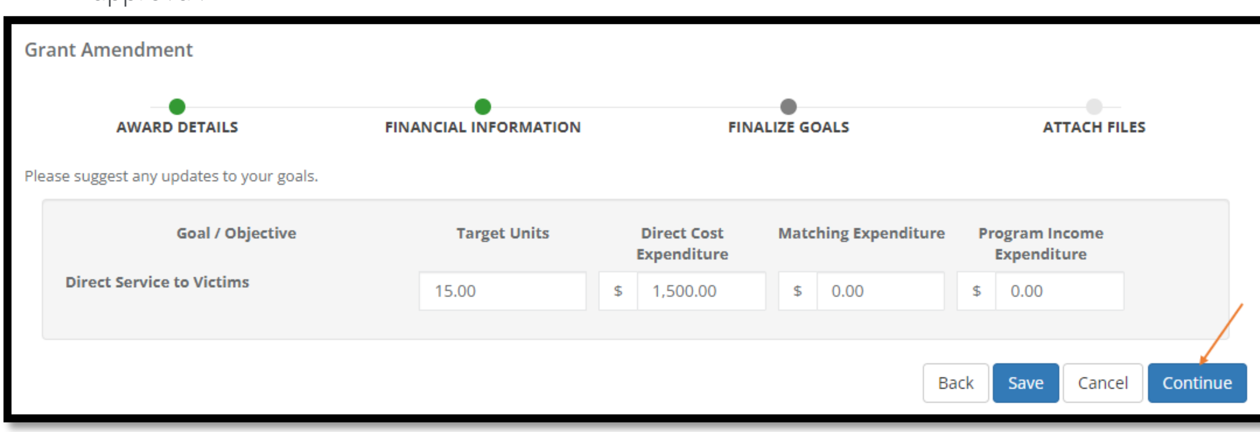
Note: If at any point in the acceptance process, a modification is made by the Subrecipient, it will be returned to the Grantor and must be approved.



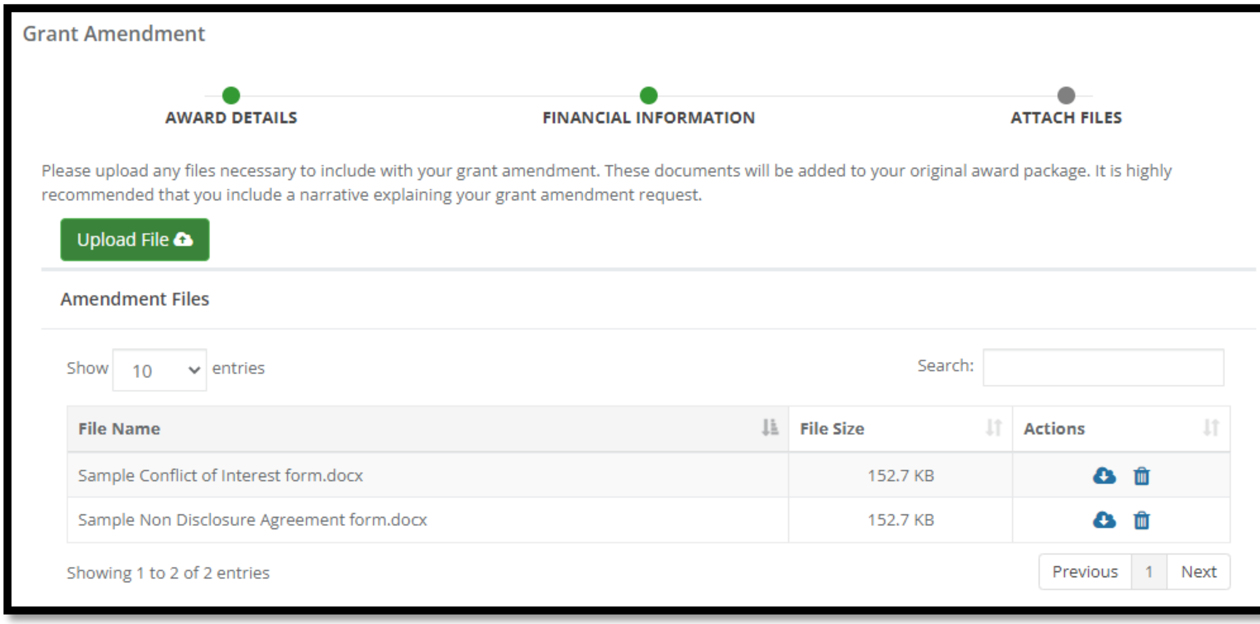
5) The next page contains the Financial Information, the display to the Subrecipient will vary based on whether a budget is associated with the award. In this example there was not a budget associated with the award, the Subrecipient would accept the new Award Amount by clicking the Continue button.



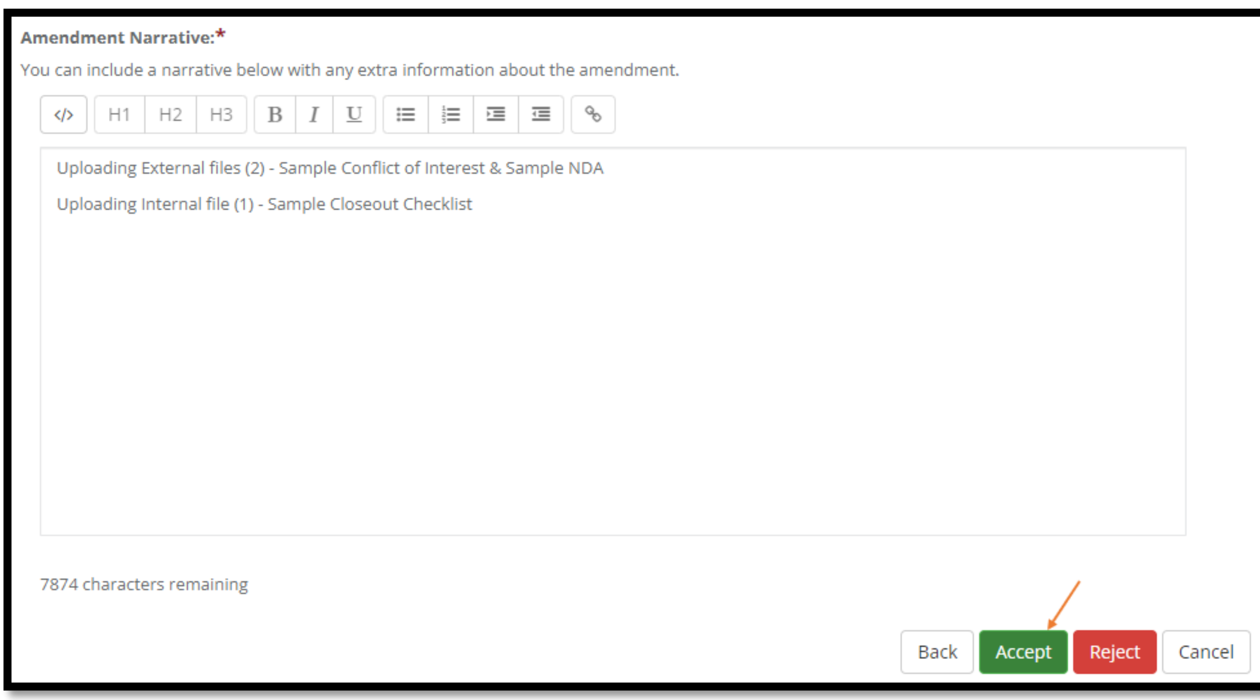
6) If Goals are associated with the award, they would appear next. To accept the Goals presented, click the Continue button. Note, if the goals are modified, they will require Grantor approval.



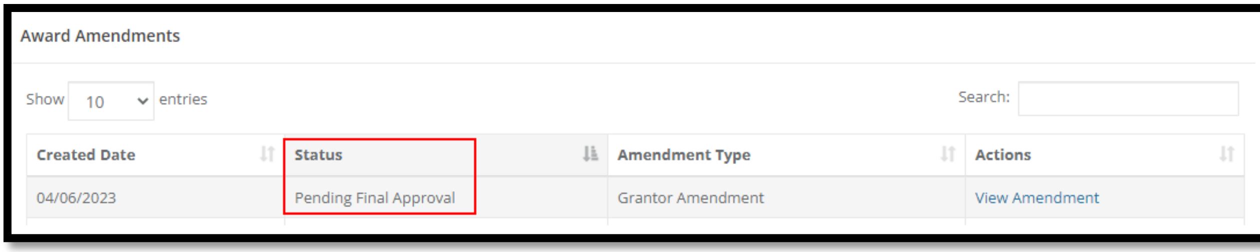
7) The final few steps in the acceptance process are to review new files associated with the Amendment. If new files are provided, to review or retrieved them at a later time, the Subrecipient must access this Amendment to view the details.



8) Finally, review the Amendment Narrative. The Grantor should provide guidance in the narrative outlining what the Amendment covers. After review, click the Accept button.



9) When accepting the Amendment, a pop-up box will appear where the Subrecipient can enter a note, which is not required. The Award Amendment status is Pending Final Approval.


Award Amendments

Show 10 entries Search:

Created Date	Status	Amendment Type	Actions
04/06/2023	Pending Final Approval	Grantor Amendment	View Amendment

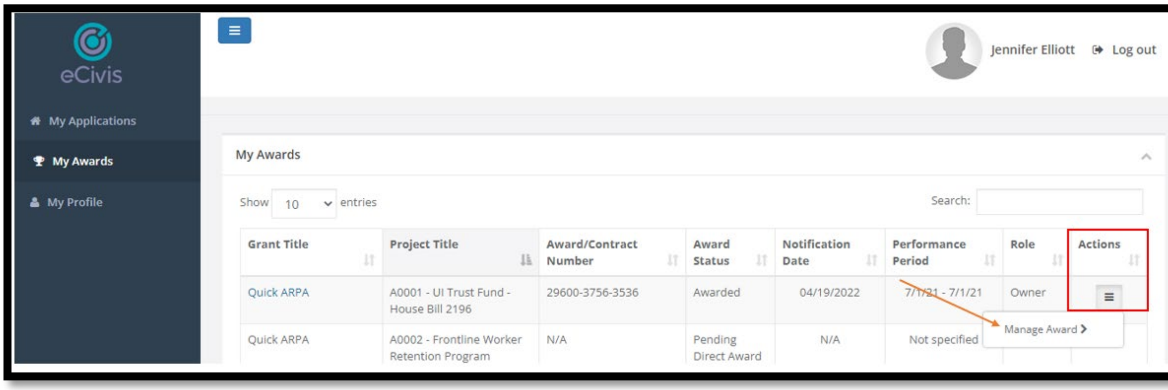
10) Reject is another option on the final page, this will generate a pop-up note that will be returned to the Grantor.
11) After final approval by the Grantor, the status will be Approved.

9. Award Closeout Process

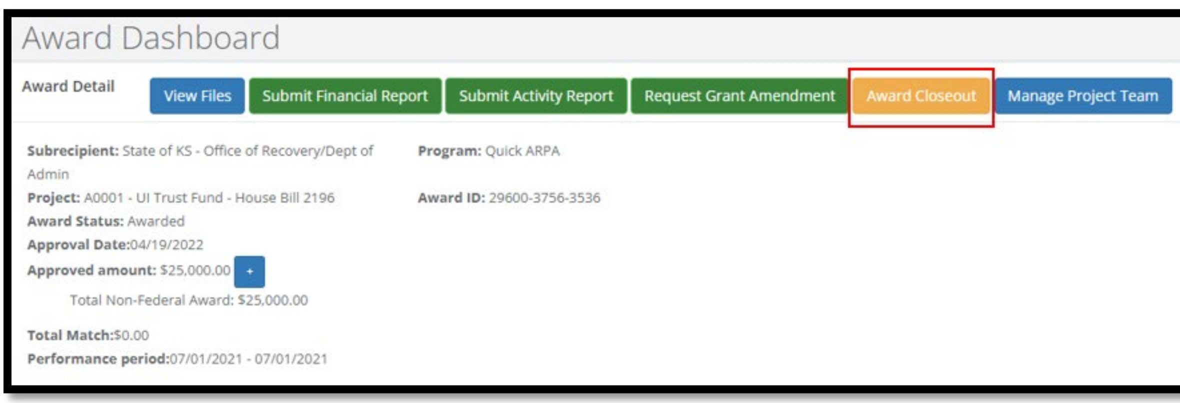
When you are ready to closeout your award, you must first reach out to the Grantor for further guidance. After reconciliation and subrecipient monitoring is complete and the Grantor agrees closeout is appropriate, you can officially close it out your award.

The eCivis Portal will require a final financial report, narrative, and upload of additional documentation. Officially closing out an award will help keep your awards organized within Portal.

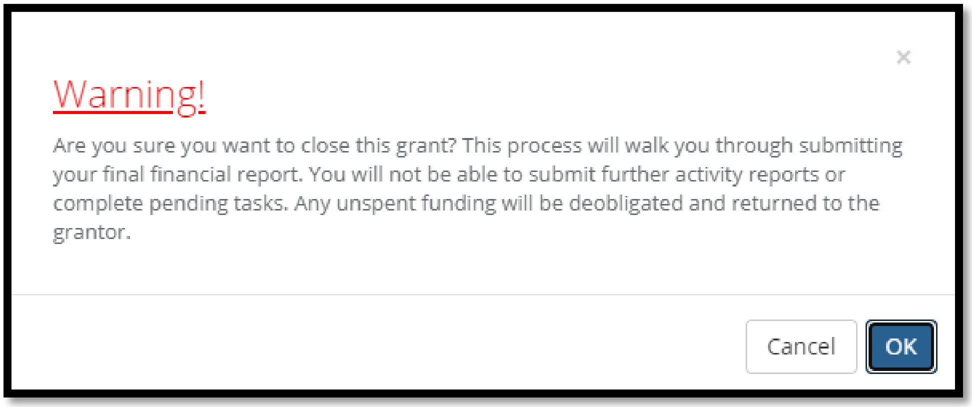
1) Click “My Awards” in the left-side navigation menu within your Portal account, then click the Action button, and “Manage Award.”



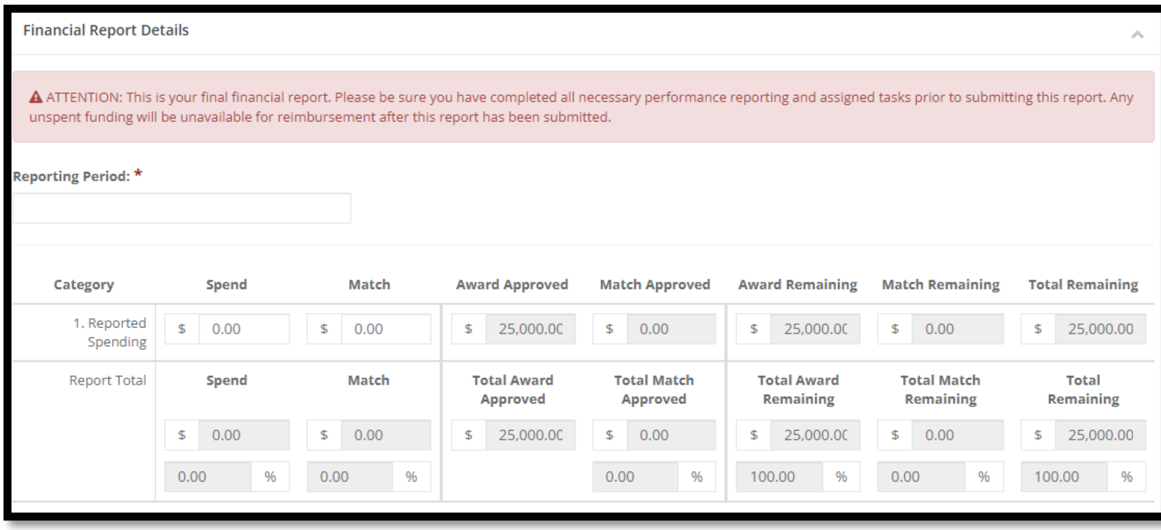
2) On your Award Dashboard, click the orange “Award Closeout” button.



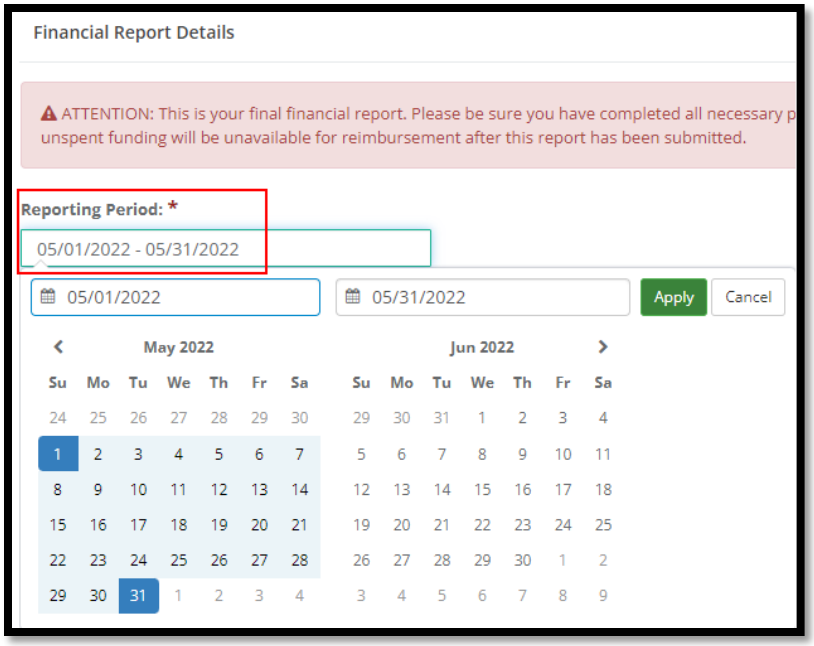
3) Read through the warning that appears and click "OK" if you accept.



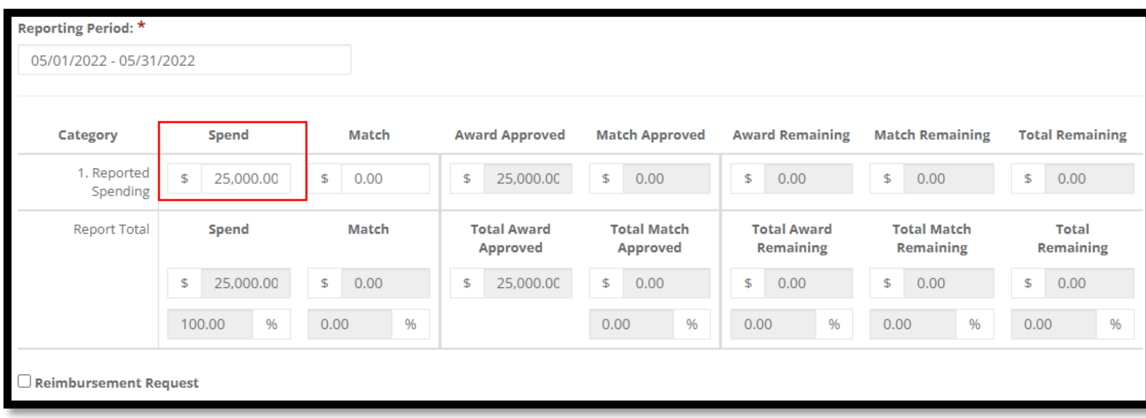
4) The Financial Report page will display, scroll down to the Financial Report Details section.



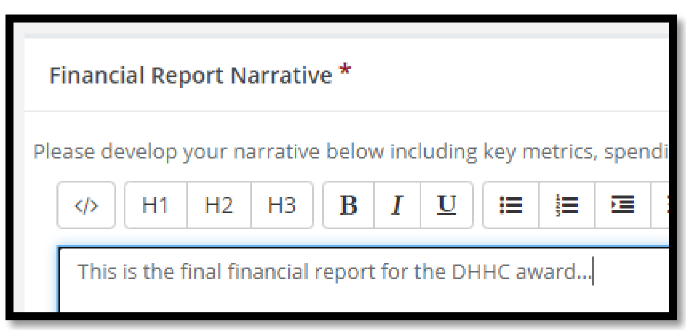
Enter the reporting period for this final financial report by clicking inside the Reporting Period text box and provide the dates of the reporting period then click "Apply."



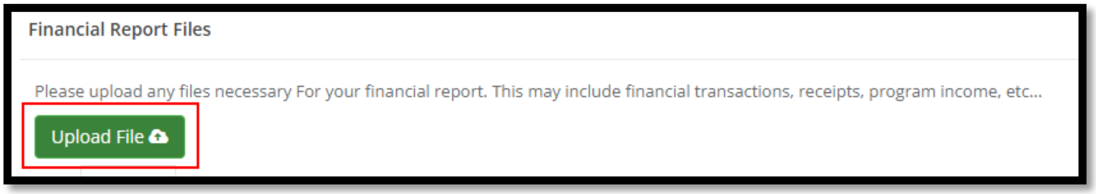
5) Enter any final financial information into the financial report.



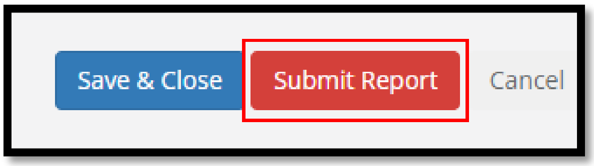
6) Enter your final financial report narrative.



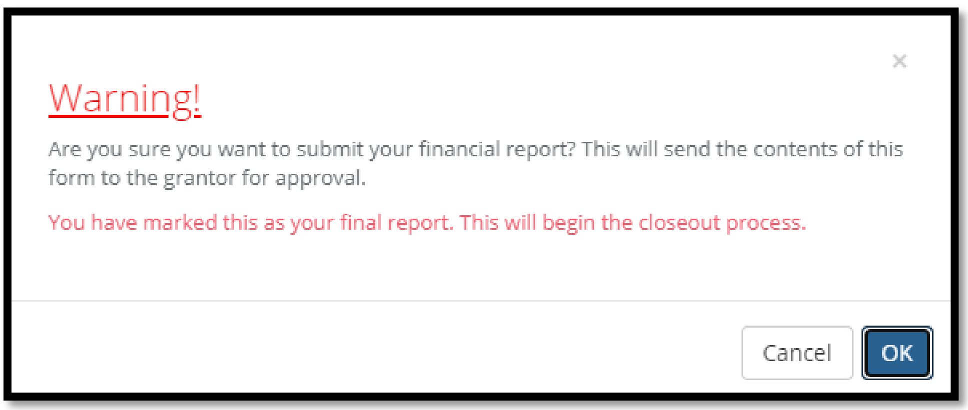
7) Upload final financial report files required by the Grantor.



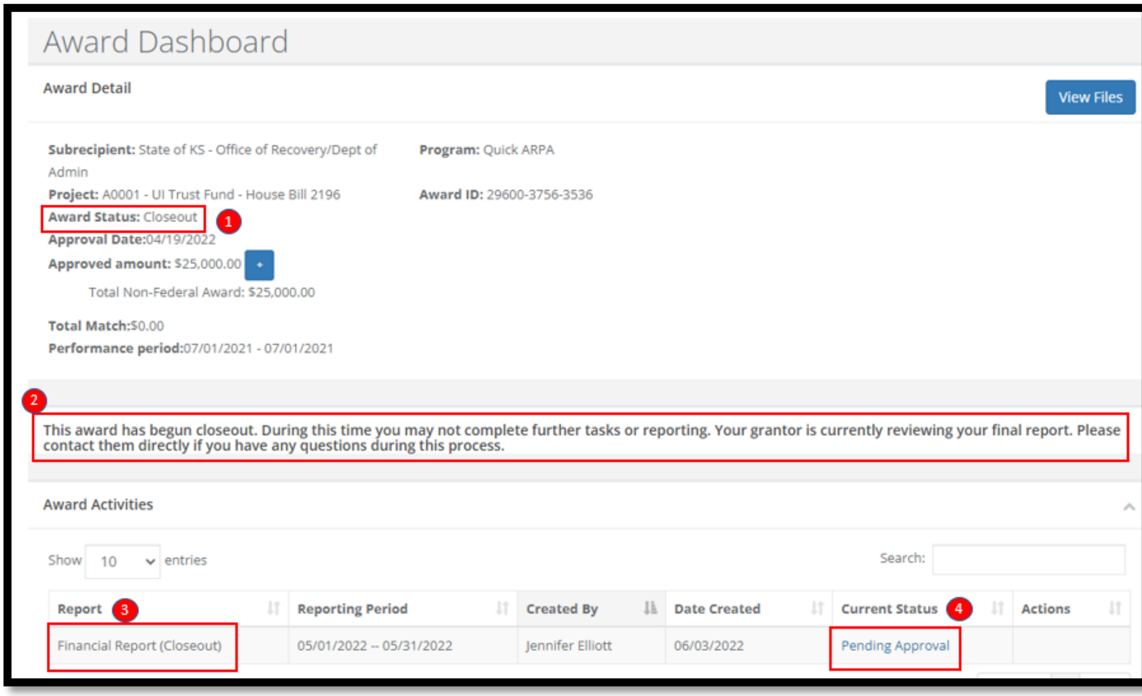
8) Click "Submit Report." You also have an opportunity to save your report and complete later.



9) Read the warning that pops up and click OK if you accept.



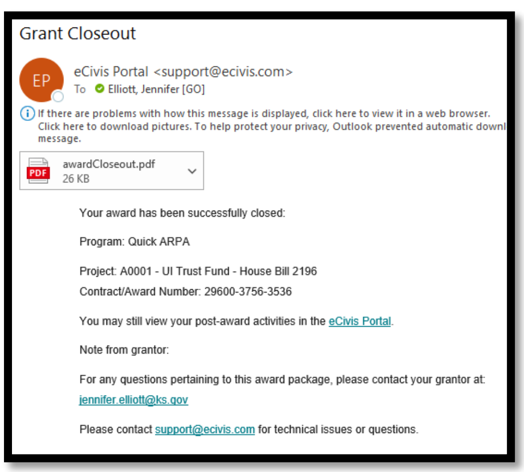
10) You are returned to the Award Dashboard.



Now you will see:

1. Award Status is "Closeout."
2. Note regarding your limited actions.
3. Financial Report (Closeout) has been sent to the Grantor for final review.
4. Current Status will change from "Pending Approval" to "Approved" once the Grantor has approved Closeout.

11) After the Grantor has approved the closeout, you will receive an email confirmation of the Grant Closeout.



12) Other options the Grantor has is to Return to Subrecipient for correction; or to Reject. If returning to the subrecipient, the grantor will provide details on why the closeout reporting is being returned by adding a Closeout comment. If rejecting a closeout report, comments will be attached and accessible in the Award Activities section, the award status will be reset to Awarded from Closeout.

Appendix A - State Agency Naming Convention:

State Agency Naming Convention

016 - Abstracters Board of Examiners
028 - Board of Accountancy
034 - Adjutant General
039 - Kansas Department for Aging & Disability Services
046 - Kansas Department of Agriculture
058 - Kansas Human Rights Commission
082 - Attorney General
083 - Kansas Bureau of Investigation
094 - Bank Commissioner
100 - Kansas Board of Barbering
102 - Behavioral Sciences Regulatory Board
105 - Board of Healing Arts
122 - Citizens Utility Ratepayer Board
143 - Corporation Commission
149 - Board of Cosmetology
159 - Department of Credit Unions
167 - Dental Board
173 - Department of Administration
175 - Kansas Housing Resources Corporation
176 - Kansas Development Finance Authority
177 - Ellsworth Correctional Facility
178 - Office Administrative Hearings
195 - El Dorado Correctional Facility
204 - Board of Mortuary Arts
206 - Emergency Medical Services
234 - Fire Marshal
246 - Fort Hays State University
247 - Governmental Ethics Commission
252 - Governor
261 - Kansas Guardianship Program
264 - Department of Health & Environment
266 - Board of Examiners of Hearing Instruments
270 - Health Care Stabilization Fund
276 - Department of Transportation
280 - Kansas Highway Patrol
288 - Kansas Historical Society
296 - Department of Labor
300 - Department of Commerce
313 - Hutchinson Correctional Facility
328 - Board of Indigents Defense Services
330 - Information Network of Kansas

331 - Insurance Department
335 - Office of Information Technology Services
349 - Judicial Council
352 - Kansas Juvenile Correctional Complex
363 - Kansas Neurological Institute
365 - Kansas Public Employees Retirement System
367 - Kansas State University
373 - State Fair Board
379 - Emporia State University
385 - Pittsburg State University
400 - Lansing Correctional Facility
408 - Larned Correctional Mental Health Facility
410 - Larned State Hospital
422 - Legislative Coordinating Council
425 - Legislative Research Dept
428 - Legislature
434 - State Library
446 - Lieutenant Governor
450 - Kansas Lottery
482 - Board of Nursing
488 - Board of Optometry Examiners
494 - Osawatomie State Hospital
507 - Parson State Hospital and Training Center
521 - Department of Corrections
522 - Kansas Correctional Industries
529 - Commission on Peace Officers Standard and Training
531 - Board of Pharmacy
534 - Real Estate Appraisal Board
540 - Legislative Division of Post Audit
549 - Real Estate Commission
553 - Kansas Racing and Gaming Commission
561 - Board of Regents
562 - Board of Tax Appeals
565 - Department of Revenue
579 - Revisor of Statutes
581 - Norton Correctional Facility
604 - School for the Blind
610 - School for the Deaf
622 - Secretary of State
626 - Kansas Sentencing Commission
629 - Department for Children and Families
652 - Department of Education
660 - Topeka Correctional Facility
663 - Board of Technical Professions

670 - State Treasurer
671 - Pooled Money Investment Board
677 - Judicial Branch
682 - University of Kansas
683 - University of Kansas Med Center
694 - Commission on Veterans Affairs Office
700 - Board of Veterinary Examiners
709 - Kansas Water Office
710 - Kansas Wildlife & Parks
712 - Winfield Correctional Facility
715 - Wichita State University

Appendix B – Monthly Financial Report Language:

Suggested language on items to include in monthly financial reports.

1) Identify any changes to the amount of Spend for this reporting period from previous reporting period, e.g., “An amount of $5,000 was entered into Spend for the reporting period ending June 30, 2022. Find our attached SFRF Tracking spreadsheet as well.”.
2) Submitting a final financial report, e.g., “All funds have been accounted for, our agency would like to begin the closeout process by providing our final financial report.”.
3) If there have been no changes in Spend from the previous report, e.g., “There are no updated Spend amounts for the reporting period ending June 30, 2022. Find our attached SFRF Tracker spreadsheet reflecting no updates.”.
4) If you need to report an adjustment made to correct an error in reporting, provide a detailed description of the changes made and upload all supporting documentation needed.