

eCivis Grants Portal
CAL FIRE Grantee User Guide



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Introduction

This *eCivis Grants Portal – Grantee User Guide* is intended to provide a grantee with general guidance on accessing the Grants Portal to manage their grant award and complete all required reporting for a CAL FIRE Grant Program. You will need to refer to the Program Grant Guidelines for specific requirements including details and format of required reporting for your award. Please refer to the Application Submittal User Guide available on the CAL FIRE Grants webpage (<https://fire.ca.gov/grants>) for guidance using the eCivis Grants Portal to apply for a CAL FIRE Grant Program.

We recommend the following browsers for the best user experience and Grants Portal system functionality:

- Google Chrome
- Mozilla Firefox
- Microsoft Edge

You may contact CALFIRE.Grants@fire.ca.gov for general questions related to CAL FIRE Grant solicitations. For Program specific questions, please refer to the Program and/or Region Contacts identified in the grant guidelines and agreements. For any technical questions on the submission portal, contact eCivis staff at support@ecivis.com.

NOTE: If you are reading this manual because you received an email similar to below and were invited to join a grant project team in the eCivis Portal system, proceed to the first chapter but you will not perform any of the actions in Chapters 2 or 4.



Jan Smith has invited you to join their grant project team on the eCivis Portal.

Project Name: San Diego County Research Proj A

Please use the following link to respond. You may be required to create a free account if you do not already have an account on the eCivis Portal:

<https://portal.ecivis.com/#/loginTeam/334A9C83-67C2-415C-9C2B-40DCFDBAB717>

Sincerely,

The eCivis Support Team

support@ecivis.com

(877) 232-4847, option 2, 8am-5pm PT

1. Creating your eCivis Portal Account

1.1. What is an eCivis Portal Account?

If you are currently managing a CAL FIRE grant or you are applying for a program solicitation, you will need to create a Portal account. Go to [eCivis Portal Login Page](#) to create your Portal account. This free account is where you will create a user profile, manage your application submissions and if awarded, manage your post-award reporting.

The screenshot shows the eCivis Portal login interface. On the left, there is a 'Welcome to the Portal' message with the eCivis logo and a brief description of the service. On the right, there is a login form with fields for 'Login' and 'Password'. Below the password field, there is a note: '(Minimum 8 chars, alphanumeric with symbol(s))'. There are four numbered callouts: 1) 'Portal Login' button, 2) 'Grants Network® Login' button, 3) 'Forgot Password?' link, and 4) 'Create an account' button. Below the buttons, there is a section for 'eCivis Grants Network user?' with instructions to use existing login information.

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- 1) Portal Login [Most Common]: for users who have an eCivis Portal account only or are creating a new eCivis Portal account and do not have an existing client account with eCivis Grants Network.
- 2) eCivis Login: for users who have an eCivis Grants Network account. It will be the same username and password used to log into eCivis Grants Network.
- 3) Forgot Password? Reset your password by entering your email on the following window.
- 4) Create an account: for new users without a Portal account.

1.2. How do I create an account?

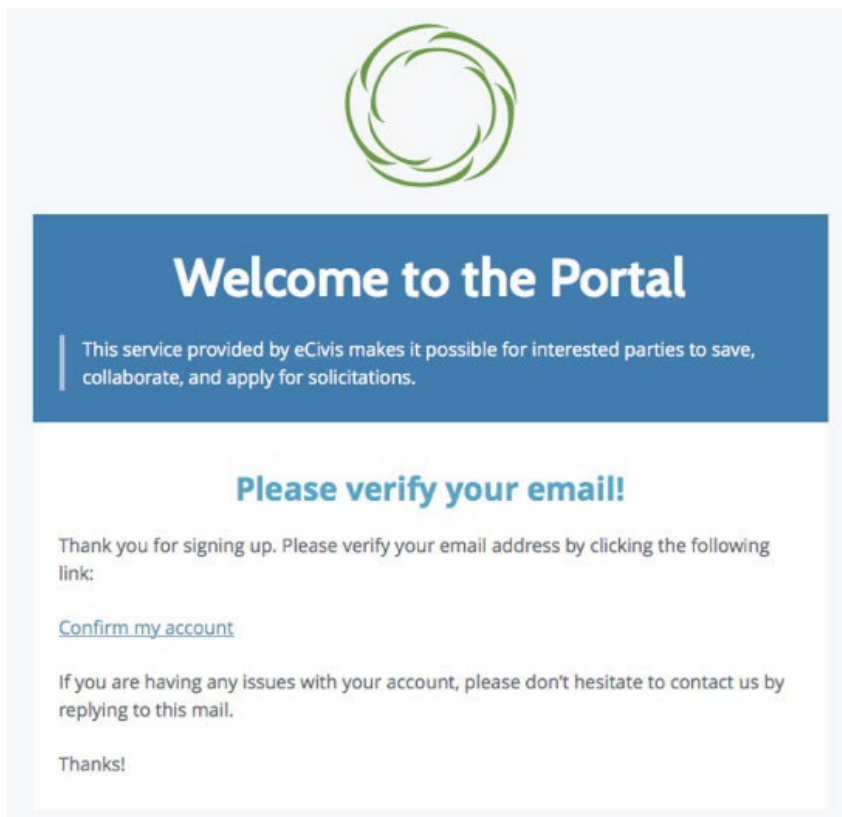
Click on *Create an Account*, and enter the following information on the page that appears:

The screenshot shows a 'New Account Signup' form. At the top, it says 'Welcome to the grant application portal. This free service provided by eCivis allows grant seeking applicants the ability to save, collaborate'. Below this are four input fields: 'First Name', 'Last Name', 'Email Address', and 'Password'. Each field has a red circle with a number (1, 2, 3, 4) next to it. Below the password field is a red bar with the word 'Weak'. At the bottom of the form is a blue 'Sign Up' button with a red circle with the number 5 next to it. Below the button is a link that says '← Back to Login'.

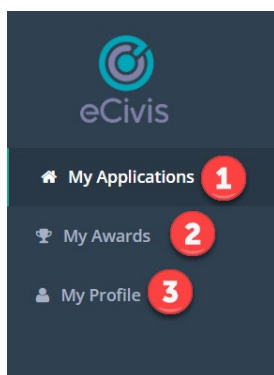
- 1) First Name
- 2) Last Name
- 3) Email Address: Your full email address where you will receive your confirmation email. Your full email address will also be your username.
- 4) Password: Your password must consist of uppercase and lowercase letters, numbers, and a special character.
- 5) Sign up: Clicking here will send you a confirmation email. You will need to click on the Portal link in the email to activate your account.

Clicking on the Sign Up button and Portal will send you a confirmation email. You will need to click on the Portal link in the email to activate your account.

You will be taken to the Welcome to Portal Confirmation Page. Now click on the “Login to the Portal” link and enter your login credentials:



You will be taken to your Portal Navigation Bar where you can select My Applications, My Awards or My Profile:



1. My Applications: Access to applications and programs.
2. My Awards: Access to all the programs that you were awarded.
3. My Profile: Access to your profile information.

NOTE: If this is your first time in Portal you will be asked to complete your Profile.

1.3. How do I create my eCivis Portal Account Profile?

- 1) Once you log in to Portal for the first time, you will be taken to My Profile, where you can complete your profile information that will be used when submitting applications for review and consideration. Fields with red asterisks are required:

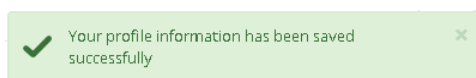
The screenshot shows the 'My Profile' page. On the left is a dark navigation bar with 'My Profile' highlighted. The main area has a header 'My Profile' with a placeholder profile picture. Below are two sections: 'Applicant Information' and 'Organization Information'. The 'Applicant Information' section has fields for First Name (Kolly), Last Name (Young), Email, Title, Company, Company Website, City, and State (California). The 'Organization Information' section has fields for Organization Name, Employer Identification Number (EIN), DUNS, Authorized Representative, Business/Finance Representative, and Organization Address. Red asterisks are next to First Name, Last Name, and State. A red box highlights the 'My Profile' menu item.

NOTE: Information entered on this page will automatically be ported into each application profile if you are also using the system to submit an application. The application profile information may be edited for individual applications during the application process. Instructions on applying for a grant is covered in the [eCivis Grants Portal Application Submittal User Guide](#).

- 2) Click on *Update Profile*, located at the bottom of the profile form, to save your profile information:



A green success message will appear in the top right corner:



NOTE: This can be edited at any time by selecting *My Profile* from the left navigation bar.

1.4. What if I forgot my password?

Click on the *Forgot Password* text, enter your email address, and click on the Reset button. You can then re-enter your email to be sent a new password:

Welcome to the Portal

This service provided by eCivis makes it possible for interested parties to save, collaborate, and apply for solicitations. Login, or create a free account to start.

Login

Password
(Minimum 8 chars, alphanumeric with symbol(s))

Portal Login

Grants Network® Login

Forgot Password?

Don't have an account?

Create an account

eCivis Grants Network user?
Use your existing login above and the Grants

Forgot password?

Enter your email address below and a link to reset your password will be emailed to you.

Email Address

Reset

← Back to Login

2. How do I accept an award?

There are two situations in which you would receive a notice of award from CAL FIRE requesting that you formally accept/deny the award in Portal:

- 1) You submitted an application within Portal which was selected for award

Or

- 3) You did not submit an application within Portal, but CAL FIRE initiates a “Direct Award”.

NOTE: If you received an email invite to join a grant project team, the award is already accepted, and you may skip to Chapter 3.

2.1 Direct Award Initiated

If you receive an email notification that a Direct Award has been initiated for your program, you will need to connect your Portal account (or create one if still needed) to begin the acceptance process:



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

Grantor: California Department of Forestry and Fire Protection (CAL FIRE)

Program Name: eCivis Testing Fire Prevention

Project Title: Stanislaus County Fire Prevention Project

Note from grantor:

Hello Ms. Henderson,

Your project is being considered for award and you will need to set up an account within the CALFIRE eCivis Portal to accept.

Thank you,

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](#)

Sincerely,

The eCivis Support Team

NOTE: If you wish to have the award linked to an email address other than the email address that the email notification was sent to, the next step is your chance to log into the desired Portal account and utilize that email address as the main contact for this grant agreement. The account linked to the new email address will become the Owner for the project.

- a. If you do not have an existing login, refer to Chapter 1.2 for instructions on creating a new account from this screen. Otherwise, proceed with entering your username and password.

Welcome to the Portal

This service provided by eCivis makes it possible for interested parties to save, collaborate, and apply for solicitations. Login, or create a free account to start.

Login

Password
(Minimum 8 chars, alphanumeric with symbol(s))

Portal Login

Grants Network® Login

Forgot Password?

Don't have an account?

Create an account

eCivis Grants Network user?
Use your existing login above and the Grants Network® Login button.

- b. Fill in the requested information regarding the organization you are representing and project that is being considered for award. All required fields will be identified with an asterisk (*).

c.

California Department of Forestry and Fire Protection (CAL FIRE)
Fire Prevention FY 2020-2021

Before California Department of Forestry and Fire Protection (CAL FIRE) can set up your award package, we need some basic information from you. If necessary, please contact the program coordinator directly for more information.

Direct Award Initiation

Organization Details

Organization Name: *

EIN:

Project Title: *

Authorized Representative

Authorized Representative

Full name: *

Email Address: *

Address: *

Address 2:

City: *

State: *

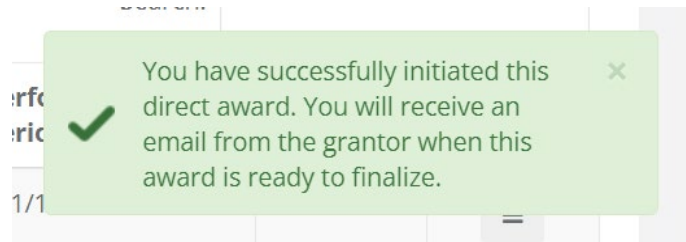
Zip: *

Phone: *

Phone Ext:

Continue Decline Award

- d. You will receive a green notification on the next screen to confirm you have successfully initiated the Direct Award process. The next step will be to hear a response if your award is approved and you are requested to accept it.



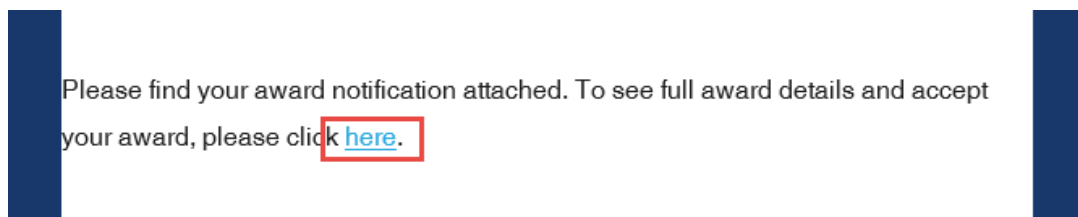
2.2. Accepting/Declining My Award

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

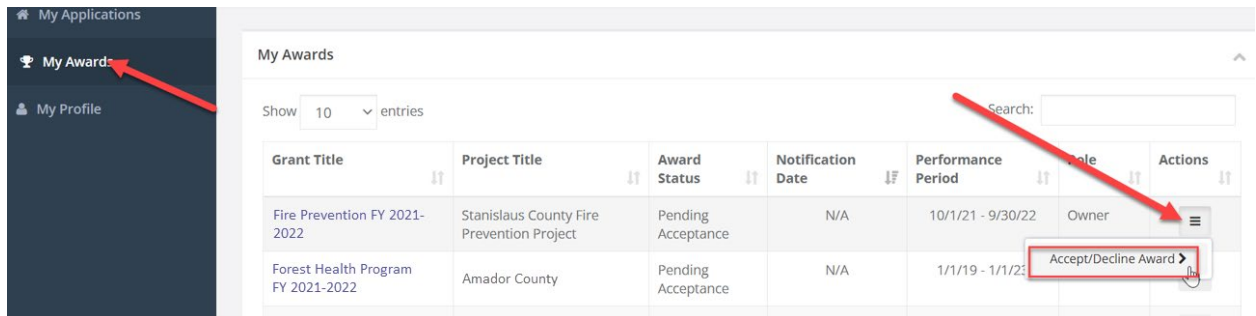
If you have been selected to receive an award, you will be notified by email. The email will also have a PDF version of the award notification for your records:



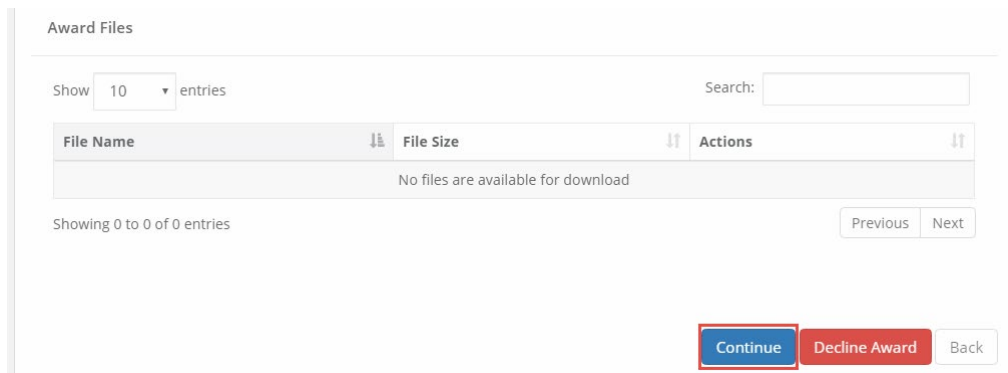
- 1) Click on the link to Portal at the bottom of the email notification:



- 2) Log into Portal and click on *My Awards* from the left-hand Navigation bar. Then, locate the appropriate Award title, or from the Actions column, and select *Accept/Decline Award*:



- 3) From the following page, download 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, however, you are strongly encouraged to reach out to the applicable CAL FIRE representative for your award prior to requesting the changes to ensure that the changes are acceptable.

DOWNLOAD FILES
FINALIZE BUDGET
ATTACH FILES

Please review your awarded budget. Please note that the grantor may have amended your budget, and it is reflected below. If you need to make changes you can request a Grant Amendment before "Request Amendment" at the bottom of this page. Please ensure your accuracy. The grantor will review the amended budget during finalization.

Budget Settings	Budget Summary
Multi-Term Budget: <input checked="" type="radio"/> No <input type="radio"/> Yes	\$1,050,000.00 Total Direct Costs
Indirect Costs: Not Applicable (v) 0.00 %	\$0.00 Total Indirect Costs
Match / Cost Share: Not Applicable (v) 0.00 % \$ 0.00	\$1,050,000.00 Total Amount (Direct + Indirect)
Budget Stage: Awarded	\$0.00 Match / Cost Share
Actions:	\$0.00 Program Income

Budget Items

1. Salaries & Wages

	Ext Cost	Direct Cost	Ind Cost	Cost Share
Contractual Totals:	\$61,500.00	\$61,500.00	\$7,380.00	\$0.00

Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Indirect Cost	Cost Share

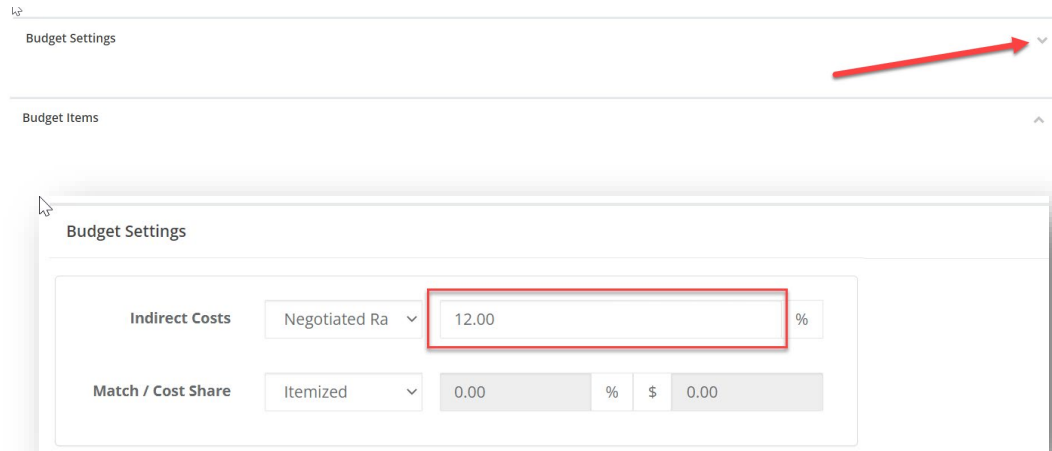
- a. If you plan to decline your award offer, click "Decline Award."

This screenshot shows the bottom of the award offer screen. It includes a "Save Narrative" button, a character count of "8000 characters remaining", and four action buttons: "Accept and Continue" (blue), "Request Budget Change" (red), "Decline Award" (red), and "Back" (grey). A red arrow points to the "Decline Award" button.

- b. If you would like to request a budget change and make edits before accepting, you must start by clicking "Request Budget Change." This will unlock the Budget so that you can make edits and proceed to the "Return to Grantor" button on the final screen. Continue for steps in editing your budget.

This screenshot is identical to the one above, showing the bottom of the award offer screen. A red arrow points to the "Request Budget Change" button.

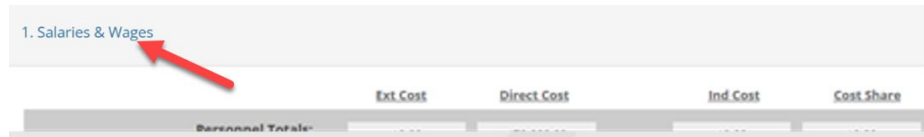
First, if Indirect Costs are applicable, indicate the Negotiated Indirect Cost rate within the “Budget Settings”:



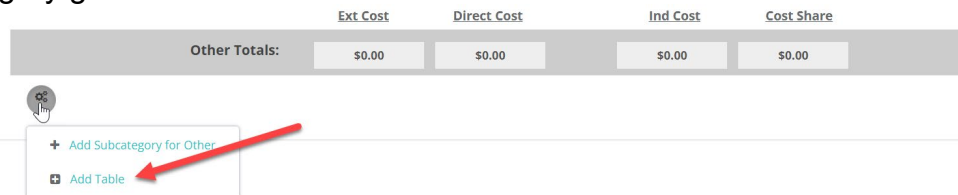
NOTE: Prior to award, CAL FIRE will review your proposed budget and the applicability of indirect costs against eligible direct costs. Approved indirect costs will be included as a separate “Indirect Cost” Budget Item and not calculated as indirect costs within the individual Budget Items.

Then scroll down to enter or edit costs by category. The totals for Direct Cost, Indirect Cost, the combined total, and the match/cost share will appear in the summary table above as you enter them in:

- i. Click on one of the budget categories titles:



- ii. If there is no table below the grey subtotal display boxes, click the grey gear icon to “Add Table”:



- iii. The budget should already have tables present and the first row is populated with detailed instructions on how to fill each line item.

3. Contractual

		Ext Cost	Direct Cost	Ind Cost	Cost Share
Contractual Totals:		\$61,500.00	\$61,500.00	\$7,380.00	\$0.00

Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Indirect Cost	Cost Share
Use Titles to briefly describe each item. Cost Share from the grantee and from a partner can be tracked on separate lines. Note that your indirect cost rate setting (which must be between 0 and 12%) will automatically	In each rows Description, enter the unit of measurement and choose from only the following labels: Hours, Days, Each, Report, Contract, Miles, Daily, Acres	0.00	\$0.00	\$0.00	\$0.00		<input type="checkbox"/>	\$0.00

- iv. Either edit the existing line items or click “Add Row” to add new line items. Then, fill the Title, Description, Units, and Unit Cost fields.

NOTE: The Extended Cost and Cost columns will auto-calculate from there. You can also skip straight to the Cost field if units/unit costs do not apply.

Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Indirect Cost	Cost Share
Contract with Myers	Hours	500.00	\$123.00	\$61,500.00	\$61,500.00		<input checked="" type="checkbox"/>	\$0.00

[Add Row](#)

NOTE: The Indirect Cost Column will leave a checkmark next to each line to which you may want to apply the above Negotiated Indirect Cost rate. Lastly, you will enter matching costs in the Cost Share column

- v. For *Forest Research* grants only: You will notice two additional columns in your budget tables for showing Phase 1 and Phase 2 amounts for each cost line. The Phase 1 column is what your budget uses to calculate the cost column for that line and the Phase 2 column is for display purposes only. As a result, you will

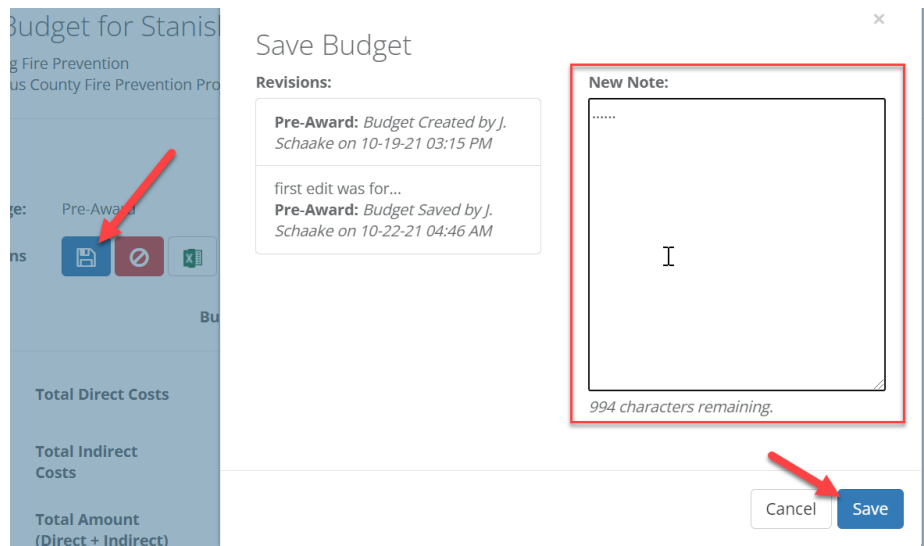
not see any of your Phase II amounts added to the Totals in your Budget Summary.

Cost	Phase 1	Phase 2	Cost
50,000.00	\$50,000.00	\$60,000.00	\$50,000.00

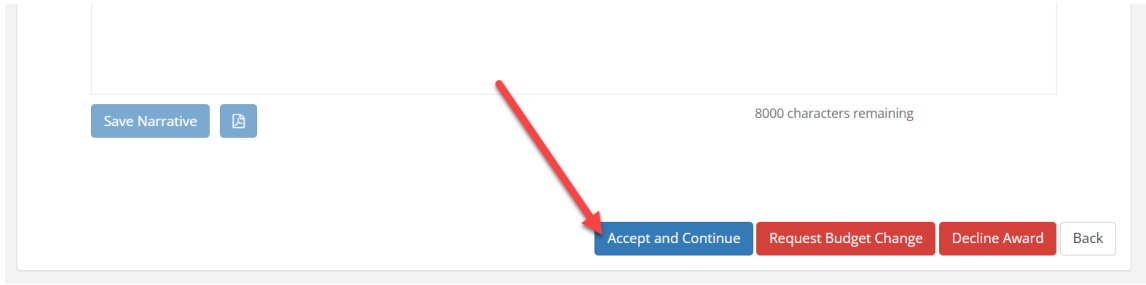
If your project should be awarded for Phase 2 funding, you will receive a new award (typically in the next fiscal cycle) that contains those Phase 2 amounts now in the Phase 1 column.

Cost	Phase 1	Phase 2	Cost	GL
60,000.00	\$60,000.00		\$60,000.00	

- c. You can include a narrative in the Budget Narrative section to further explain and justify your changes. Please refer to the guidelines for your grant program as the budget narrative may need to be included as part of your Scope of Work or other grant attachments in lieu of including in the Budget Narrative field.
- d. When finished with your edits, click the Save button and leave any applicable notes about the edits made. A history of your revision notes appears to the left:



- 5) Once you are finished reviewing or editing the budget, select “Accept and Continue” at the bottom of the page.



- 6) For programs with activity goals, you will proceed to the next page to view/edit your project goals. Confirm the target amounts for your project activity according to the prescribed rows. Keep in mind that some goals will have subgoals below them that calculate a total into the goal row (the row with grey boxes). Please check with your Program/Region contacts to determine whether or not the activity goals/subgoals will need to be completed.

NOTE: If you should make any edits, be prepared to select *Return to Grantor* (not decline) on the last page to request approval of your changes.

● DOWNLOAD FILES
 ● FINALIZE BUDGET
 ● FINALIZE GOALS
 ● ATTACH FILES

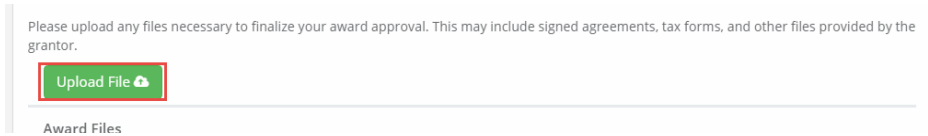
Please review your goals

Goal	Target	Direct Cost Expenditure	Matching Expenditure	Program Income Expenditure
a) Acres of Biomass Utilization :	<input type="text" value="258.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>
a01) Biomass Removal (Biochar):	<input type="text" value="60.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>
a02) Biomass Removal (Electricity):	<input type="text" value="30.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>
a03) Biomass Removal (Heat):	<input type="text" value="20.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>
a04) Biomass Removal (Renewable Fuels):	<input type="text" value="10.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>
a05) Biomass Removal (Wood Products):	<input type="text" value="20.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>
a06) Piling (Manual):	<input type="text" value="30.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>

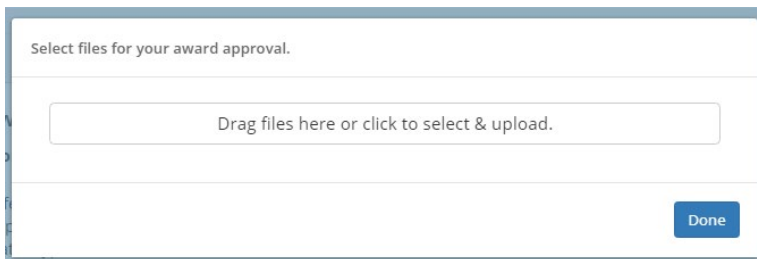
Click Save and Continue.

b) Acres of Fuels Reduction:	<input type="text" value="0.00"/>	\$ <input type="text" value="30,000.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>
b01) Chipping:	<input type="text" value="0.00"/>	\$ <input type="text" value="10,000.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>
b02) Commercial Thinning (Tractor Yarding):	<input type="text" value="0.00"/>	\$ <input type="text" value="20,000.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>

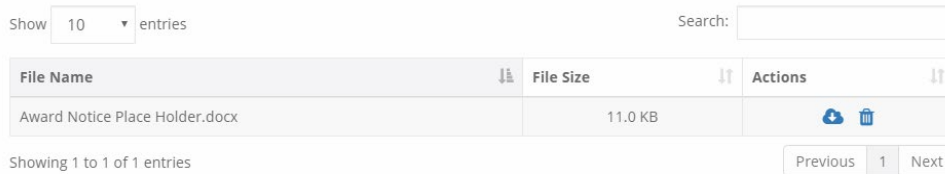
- 7) On the final screen, you will accept or return the award. If you need to attach files to accept the award, select Upload Files (refer to your grant program’s guidelines to see any required documentation and appropriate file formats):



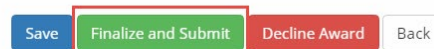
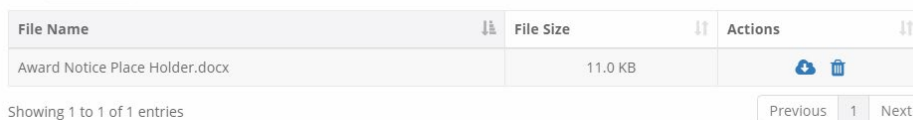
Files can be attached by selecting them from your File Explorer or dragging and dropping files from your File Explorer to the browser:



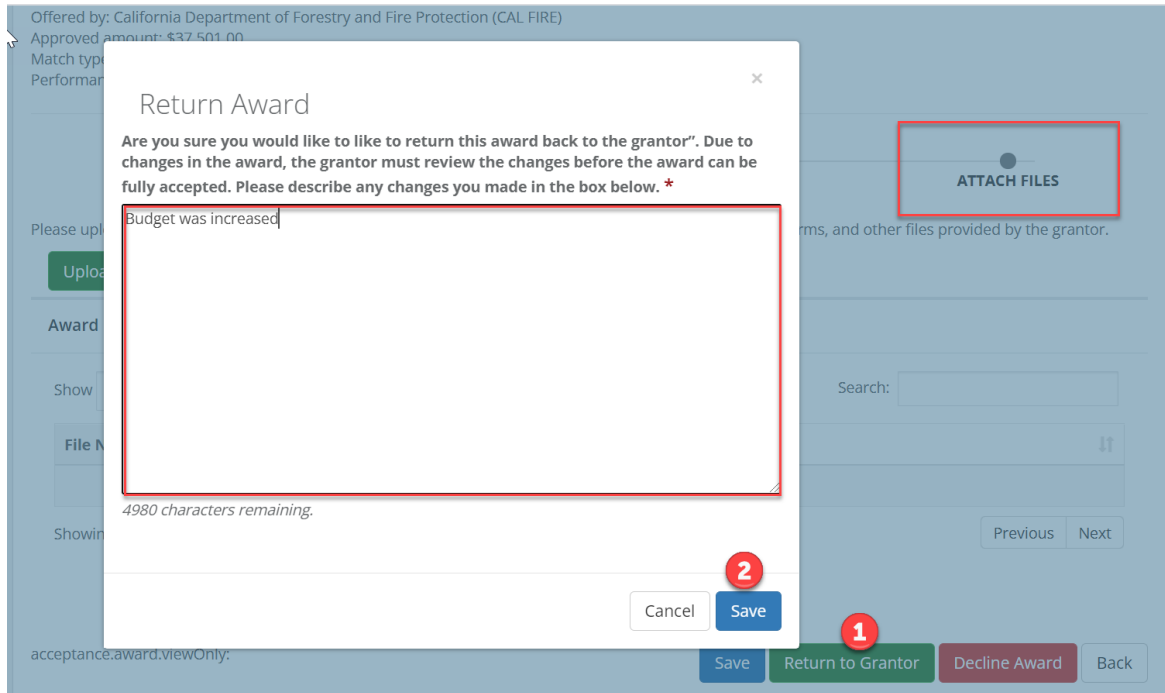
Any uploaded file can be downloaded again, or deleted using the trash icon:



- 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:



Or, if you are requesting an award revision per your edits, you will see a *Return to Grantor* button. Click this button and give a brief description of the revisions. Then click Save.



- 9) Your award acceptance will go through a final award approval process and you may receive notice to accept the award again if changes are requested of you. If you requested changes, however, you will need to go through the above steps starting with Section 2.2 once more (reviewing for accuracy) and accept to proceed to Final Award Approval. Otherwise, you will receive an email notification that your award is finalized, and you can find the award details within your Portal account.

Application Award Notification

[REDACTED]



Award Notification Letter

Dear [REDACTED],

An award package has been created by California Department of Forestry and Fire Protection for the following program solicitation:

Project:	Stanislaus County Fire Prevention Project
Program:	FY 2021-2022 Fire Prevention Grants Program
Approved Amount:	\$1,910,000.00
Federal Awards:	No federal funds were included in this award.
Other Awards:	<ul style="list-style-type: none">Greenhouse Gas Reduction Fund: \$1,910,000.00
	Total Other: \$1,910,000.00
Total Match:	\$70,000.00
Period of Performance:	12/31/2020 - 12/31/2022
Award/Contract Number:	21-FP-123456
Ein:	123123123

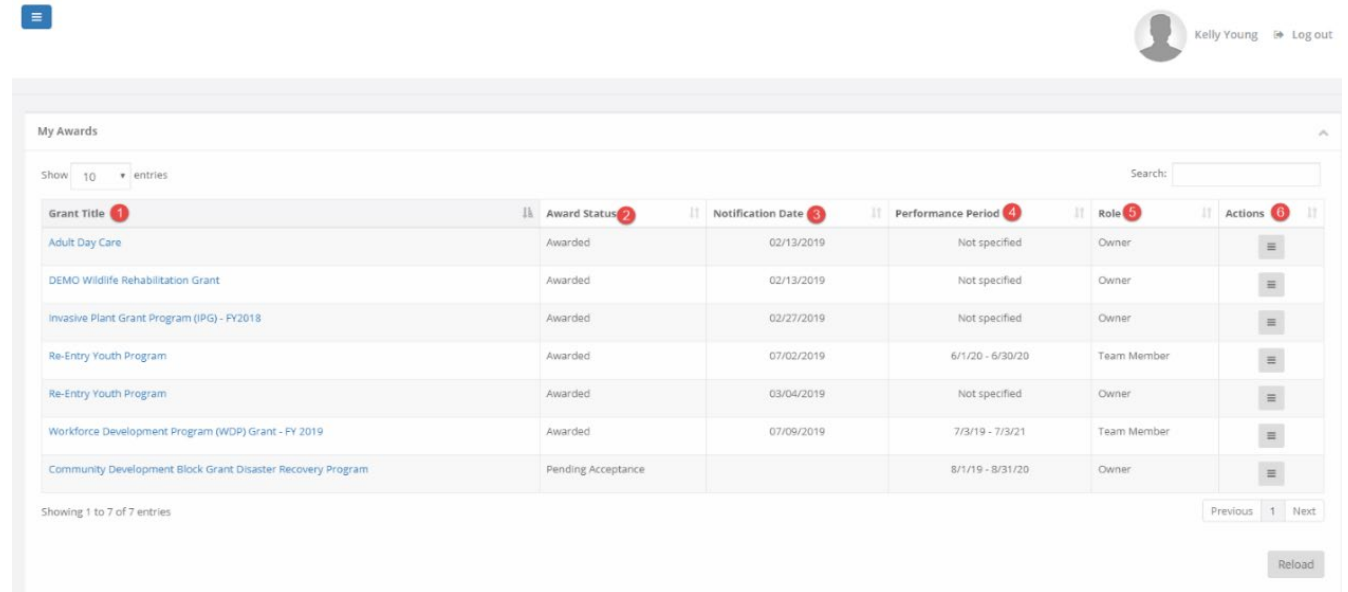
Please find your award notification attached. To see full award details and accept your award, please [click here](#).

Sincerely,

eCivis Support Team

3. How do I access the details of my grant?

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



My Awards

Show 10 entries

Search:

Grant Title ¹	Award Status ²	Notification Date ³	Performance Period ⁴	Role ⁵	Actions ⁶
Adult Day Care	Awarded	02/13/2019	Not specified	Owner	
DEMO Wildlife Rehabilitation Grant	Awarded	02/13/2019	Not specified	Owner	
Invasive Plant Grant Program (IPG) - FY2018	Awarded	02/27/2019	Not specified	Owner	
Re-Entry Youth Program	Awarded	07/02/2019	6/1/20 - 6/30/20	Team Member	
Re-Entry Youth Program	Awarded	03/04/2019	Not specified	Owner	
Workforce Development Program (WDP) Grant - FY 2019	Awarded	07/09/2019	7/3/19 - 7/3/21	Team Member	
Community Development Block Grant Disaster Recovery Program	Pending Acceptance		8/1/19 - 8/31/20	Owner	

Showing 1 to 7 of 7 entries

Previous 1 Next

Reload

1. **Grant Title:** Name of the program.
2. **Award Status:**
 - **Awarded:** You have accepted the award.
 - **Pending Acceptance:** The award is waiting for you to accept or decline it.
3. **Notification Date:** The date the program officer reviewed and approved your award.
4. **Performance Period:** The project period as specified by the Program Officer.
5. **Role:**
 - **Owner:** You submitted the application and are tracking and managing the award.
 - **Team Member:** You are not the original applicant but were invited to help track the award and submit reports.
6. **Actions:** Option varies according to award status:
 - If **Award Status is Awarded:** Manage Award
 - If **Award Status is Pending Acceptance:** Accept/Decline Award

You can click “Manage Award” on each grant title to access its Award Dashboard. The Award Dashboard contains the following sections that will be explained in the next chapter: Award Detail, Pending Tasks, Financial Activity, and Award Detail.

Search:

Award Status	Notification Date	Performance Period	Role	Actions
Awarded	04/01/2021	1/1/21 - 12/31/25	Team Member	☰
Awarded	12/06/2019	11/1/19 - 11/1/22	Owner	☰
Awarded	12/02/2019	11/1/19 - 11/1/22	Owner	☰
Awarded	12/04/2020	12/4/20 - 12/4/25	Owner	☰
Awarded	12/11/2020	12/11/20 - 12/11/25	Owner	☰ Manage Award >
Awarded	11/18/2020	11/18/20 - 11/18/25	Owner	☰

3.1. Award Detail Section

Award Dashboard

Award Detail

2 View Budget
3 View Goals
4 View Files
5 Submit Financial Report
6 Submit Activity Report
7 Request Grant Amendment
8 Award Closeout
9 Manage Project Team

1 Subrecipient: Stanislaus County
 Project: Stanislaus County Fire Prevention Project
 Award Status: Awarded
 Approval Date: 10/22/2021
 Approved amount: \$37,501.00 +
 Total Federal Award: \$37,501.00
 Total Match: \$0.00
 Performance period: 10/01/2021 - 09/30/2022

Program: eCivis Testing Fire Prevention
 Award ID: ABC123
 EIN: 123123123

1. Review the summary of the award and click “+” to view details regarding the funds that CAL FIRE allocated to your award.
2. **View Budget:** View your budget
3. **View Goals:** View your performance 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:** Begin your closeout financial report
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.

3.2. Pending Tasks Section

Task Type	Due Date	Action
Financial Report Request	10/01/2019	

1. **Task Type:** Financial, Activity, or other miscellaneous reports
2. **Due Date:** When your report is due.
3. **Actions:** Submit the report or mark as complete.

3.3. Award Activities Section

These columns can be reorganized by clicking on any column title.

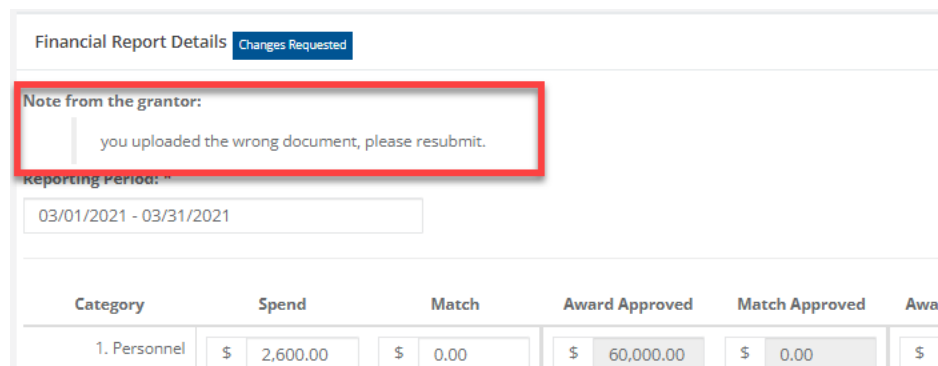
Report	Reporting Period	Created by	Date Created	Current Status	Actions
Financial Report	05/01/2019 – 05/31/2019	Ulysses Grant	07/09/2019	Approved / Awaiting Payment	View Report
Financial Report	06/01/2019 – 06/30/2019	Ulysses Grant	07/09/2019	Approved / Paid	View Report
Financial Report	07/03/2019 – 07/03/2019	Ulysses Grant	09/16/2019	Pending Approval	View Report
Financial Report	05/01/2019 – 05/31/2019	Ulysses Grant	08/26/2019	Changes Requested	Review/Resubmit
Financial Report	07/01/2019 – 07/31/2019	Ulysses Grant	07/09/2019	Rejected	View Report
Activity Report	09/01/2019 – 09/30/2019	Ulysses Grant	09/16/2019	Approved	View Report

1. **Report:** Type of report (Financial, Activity, etc.).
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:**
 - **Draft:** the report has been created but not yet submitted to CAL FIRE for review.

- **Pending Approval:** the report has been submitted to CAL FIRE and is being reviewed.
- **Approved:** the report has been approved by CAL FIRE. No payment will be issued by CAL FIRE (typically financial report is liquidating advance funds with no additional reimbursement requested by grantee).
- **Approved/Awaiting Payment:** CAL FIRE has approved the report but has not processed payment.
- **Approved/Paid:** CAL FIRE has approved the report and payment has been issued to the grantee.
- **Changes Requested:** Revision to the report and resubmittal is required.
- **Rejected:** The report has been rejected and cannot be re-submitted. If you click to "View Report", a note from CAL FIRE may have been provided on the report to explain the reason for the rejection.

6. Actions:

- **Edit Report:** For reports in draft status, this option opens the report to continue working on it and eventually submit
- **Review/Resubmit:** If a report has changes requested by CAL FIRE, the grantee will have the opportunity to edit the rejected report and resubmit it. The report will contain a comment from CAL FIRE above the report table that details the request.



Financial Report Details **Changes Requested**

Note from the grantor:
you uploaded the wrong document, please resubmit.

Reporting period:
03/01/2021 - 03/31/2021

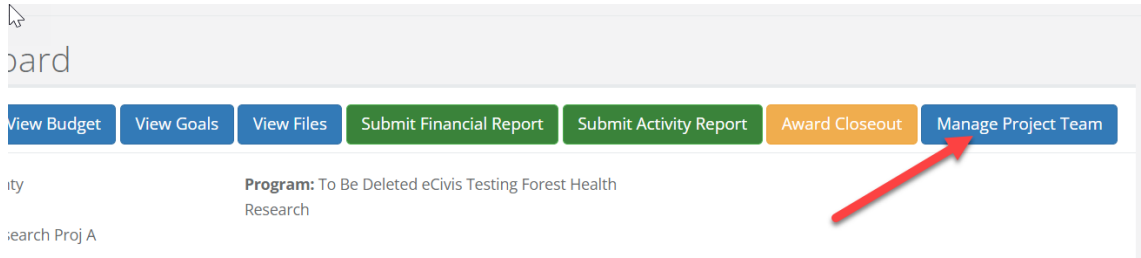
Category	Spend	Match	Award Approved	Match Approved	Awa
1. Personnel	\$ 2,600.00	\$ 0.00	\$ 60,000.00	\$ 0.00	\$

- **View Report:** Any report that is submitted and is not in a status of Changes Requested will have only the option to view the submitted report and any comments added in response by CAL FIRE

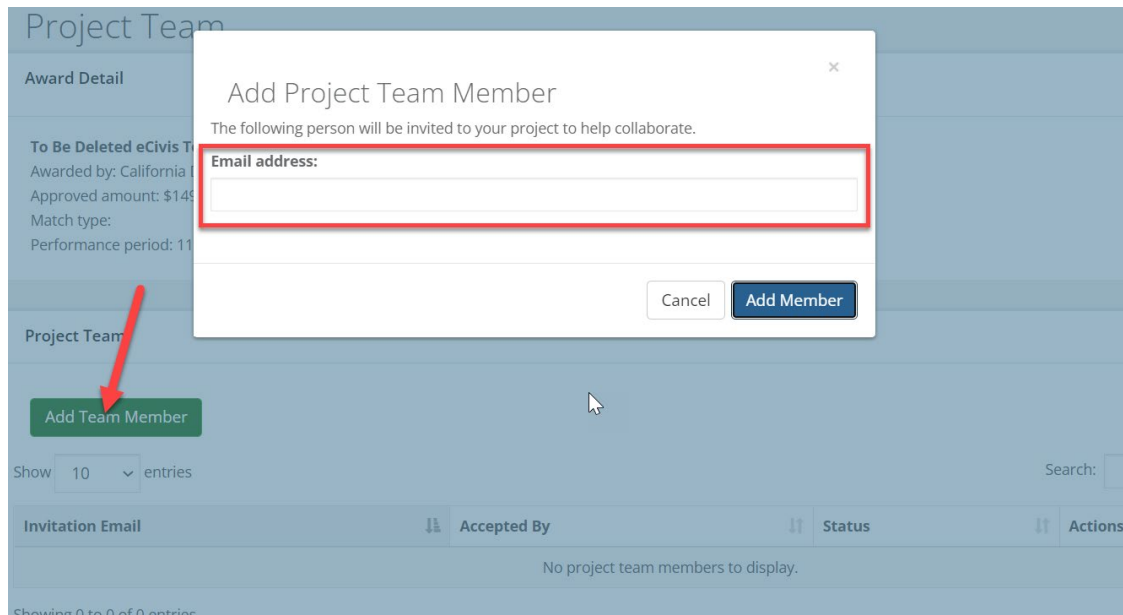
4. How do I add/remove team members for my award?

If you are the Owner of the grant award, you may add or remove team members to help with managing the award and/or completing required tasks. Team members will have full ability to submit any reports and/or amendments. If you are not the Owner of the grant award but need to add additional team members for your award, please contact your CAL FIRE Program/Region contact.

- 1) Click the Manage Project Team button from the Award Dashboard



- 2) Click the Add Team Member button and enter the recipient's email address in the box that appears. Finish by clicking Add Member.



- 3) The recipient will receive instructions to join this specific project team and to set up an eCivis Portal account if they do not already have one.



Jan Smith has invited you to join their grant project team on the eCivis Portal.

Project Name: San Diego County Research Proj A

Please use the following link to respond. You may be required to create a free account if you do not already have an account on the eCivis Portal:

<https://portal.ecivis.com/#/loginTeam/334A9C83-67C2-415C-9C2B-40DCFDBAB717>

Sincerely,

The eCivis Support Team

support@ecivis.com


(877) 232-4847, option 2, 8am-5pm PT

4) You can click the Actions icon to Resend or Delete this invitation.

Project Team

[Add Team Member](#)

Show 10 entries Search:

Invitation Email	Accepted By	Status	Actions
tester3@ecivis.com		Pending	 Resend Invitation Delete Invitation








Showing 1 to 1 of 1 entries

Previous 1 Next

5) Once accepted, the new team member should see the award listed in their My Awards list.

My Awards

Show 10 entries Search:

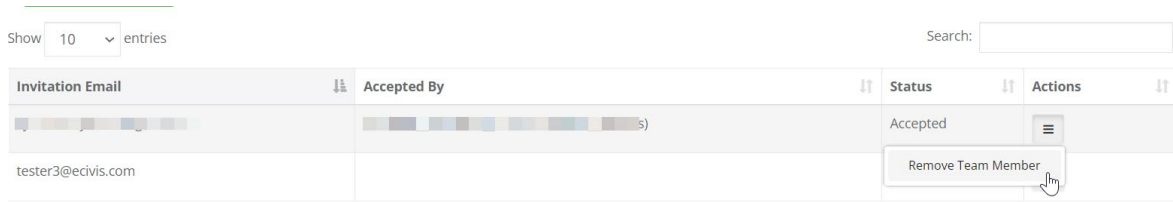
Grant Title	Award Status	Notification Date	Performance Period	Role	Actions
[Redacted]	Awarded	02/13/2019	Not specified	Owner	
[Redacted]	Awarded	02/13/2019	Not specified	Owner	
[Redacted]	Awarded	02/27/2019	Not specified	Owner	
[Redacted]	Awarded	07/02/2019	6/1/20 - 6/30/20	Team Member	
[Redacted]	Awarded	08/04/2019	Not specified	Owner	
[Redacted]	Awarded	07/05/2019	7/3/19 - 7/3/21	Team Member	
[Redacted]	Pending Acceptance		8/1/19 - 8/31/20	Owner	

Showing 1 to 7 of 7 entries

Previous 1 Next

[Reload](#)

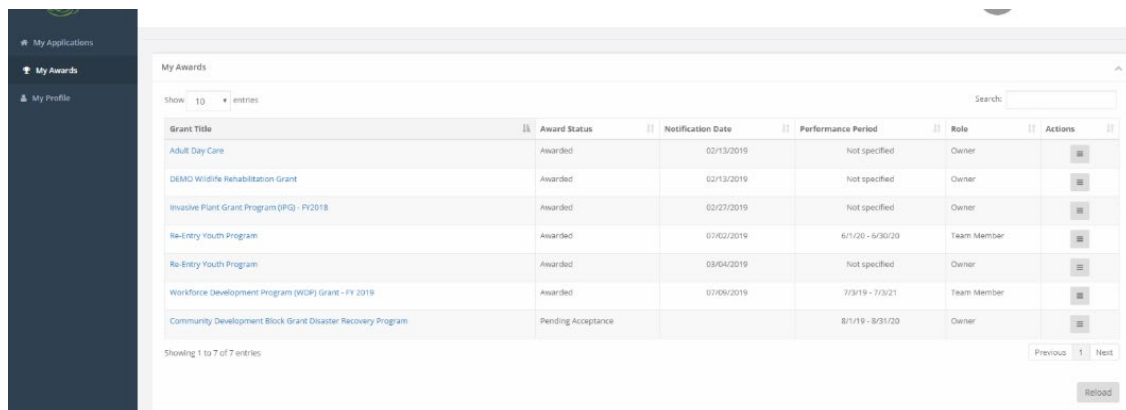
6) You can also remove users with this same menu



NOTE: If an invitation is sent to a specific team member but they would prefer to access the award using a different email address, they can do so by logging in and/or creating a new portal account using the different email address after clicking on the invitation link on the email. Please check your Junk/Spam folder in case your email gets sent there. If your team member is not receiving the invitation email after they have been invited, please [contact eCivis customer support](#) for assistance.

5. How do I submit deliverables to CAL FIRE?

1) Select “My Awards” from the navigation bar on the left of the page:



2) Locate your award title and click the corresponding menu icon under the Actions column. Select *Manage Award*.

Search:

Award Status	Notification Date	Performance Period	Role	Actions
Awarded	04/01/2021	1/1/21 - 12/31/25	Team Member	☰
Awarded	12/06/2019	11/1/19 - 11/1/22	Owner	☰
Awarded	12/02/2019	11/1/19 - 11/1/22	Owner	☰
Awarded	12/04/2020	12/4/20 - 12/4/25	Owner	☰
Awarded	12/11/2020	12/11/20 - 12/11/25	Owner	☰
Awarded	11/18/2020	11/18/20 - 11/18/25	Owner	☰

5.1. Submitting Financial Reports

From the Award Dashboard, you can submit a Financial Report directly to CAL FIRE whether you have a report due or need to initiate a new (unscheduled) report. The Financial Report should only be used to invoice for actual costs or liquidation of advance funds.

Note: In order to submit a request for advance funds, you will need to complete the Advance Payment Request task in your task list. Refer to Chapter 5.3 “Miscellaneous Tasks” for more information. If your program requires submittal of a progress report with each invoice, please refer to the Activity Reports instructions in Chapter 5.2 to complete that portion.

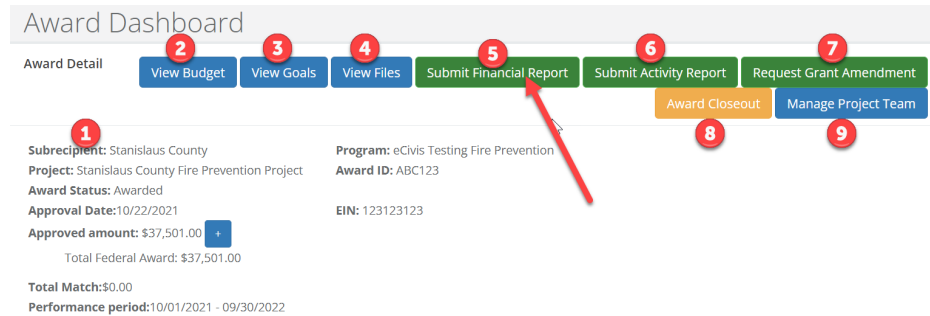
- 1) On the Pending Tasks table of the Award Dashboard, locate the Financial Report Request that is due and click the Actions menu. Select *Create Financial Report*.

Pending Tasks ^

Show entries Search:

Task Type	Due Date	Actions
Financial Report Request	04/01/2022	☰
Activity Report Request	07/01/2022	
Financial Report Request	07/01/2022	

- a. If you need to initiate a report outside of the existing tasks due, click on “Submit Financial Report”:

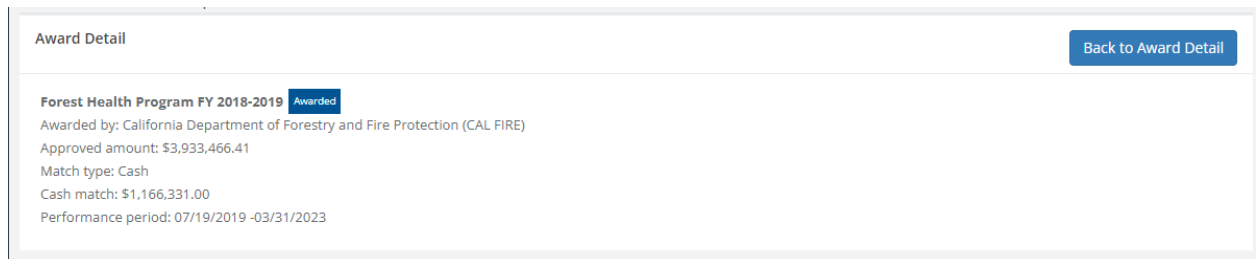


- b. Select “Continue with New Report”

- 2) Continue to the next chapters for steps on filling and submitting the report

5.1.1. Understanding the Award Detail and Financial Overview

- 1) The Award Detail provides a summary of the award information including award and match and project performance period.



- 2) The Award Financial Overview provides a high level total of expenditures, disbursement of funds, match and program income for your award.

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.				
Payments Received To Date	Advance/Allocation	Reimbursement	Total Disbursed	Pending Disbursement
	\$ 895,004.92	\$ 0.00	\$ 895,004.92	\$ 0.00
	Spend	Match	Spend + Match	
Award Total Spend to Date	\$ 515,383.90	\$ 723,323.09	\$ 1,238,706.99	
	41.61 %	58.39 %		
Advance Payment	\$ 895,004.92			
Award Remaining to Date	\$ 3,418,082.51	\$ 443,007.91	\$ 3,861,090.42	
Award Total Program Income	Received	Expended		
	\$ 1,589.38	\$ 1,589.38		

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.

Payments Received to Date:

1. **Advance/Allocation:** Represents the amounts advanced to the grantee for the entire grant award. This amount will not reduce when advance funds are liquidated.
2. **Reimbursement:** Represents the amount invoiced and reimbursed to the grantee. This amount does not reflect any liquidated advance funds.
3. **Total Disbursed:** Total funds provided to the grantee for the grant award.
4. **Pending Disbursement:** Funds requested for reimbursement by the grantee but not yet paid by CAL FIRE.

Award Total Spend to Date:

1. **Spend (\$/%):** Amount and percentage of grant funds spent by grantee including liquidation of advance funds on award
2. **Match (\$/%):** Amount and percentage of match funds reported by grantee on award
3. **Spend (\$):** Amount of grant funds and match grantee spent towards the project

NOTE: The amount of advance funds remaining to be liquidated will be the difference between Payments Received to Date Total Disbursed less Award Total Spend to Date Spend

Advance Payments: Amount of Advance Funds provided by CAL FIRE on the award.

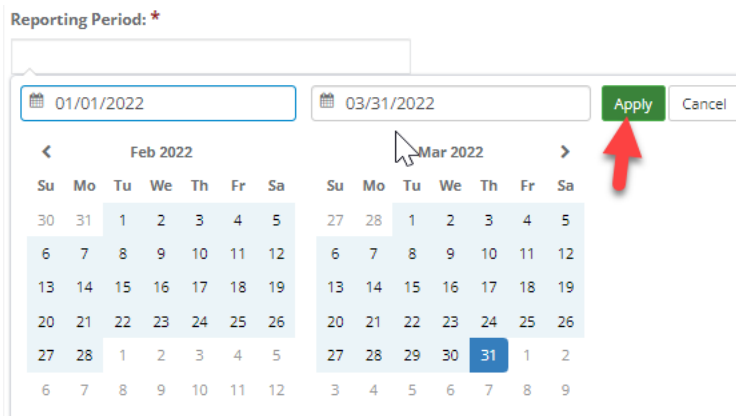
Award Remaining to Date: Remaining balance of grant funds, match and total project available.

Award Total Program Income: Represents the total Program Income earned and expended toward the grant project To Date. Both amounts should always be the same since the grantee is required to offset any income earned against their expenditures.

NOTE: For historical and active awards that were included, the Program Income may not have been captured in this field. The prior expenditures were reduced to offset any Program Income reported.

5.1.2. Completing the Financial Report

- 1) In the Financial Report Details, click inside the Reporting Period text box and provide the dates of the reporting period then click “Apply”:



- 2) CAL FIRE requires Detailed Financial Reports which means that you will need to provide details for each item of cost being charged to the grant. You will see a blank GL Code/Activity line item under each category in which you were awarded funds. Enter amounts in the appropriate category under the Spend and Match columns.

Note: If you do not see a blank GL Code/Activity line for a category, that means that you do not have any award funds budgeted or matched in that category and will not be able to identify costs. You will need to submit and be approved for a Grant Amendment (See Chapter 6) prior to being able to report on those categories.

Reporting Period: *

01/01/2022 - 03/31/2022

Category	Spend	Match	Award Approved	Match Approved	Award Remaining	Match Remaining	Total Remaining
1. Salaries & Wages	\$ 0.00	\$ 0.00	\$ 50,000.00	\$ 0.00	\$ 50,000.00	\$ 0.00	\$ 50,000.00
GL Code / Activity	Spend	Match	Description				
	\$ 0.00	\$ 0.00					
2. Employee Benefits	\$ 0.00	\$ 0.00	\$ 60,000.00	\$ 0.00	\$ 60,000.00	\$ 0.00	\$ 60,000.00
GL Code / Activity	Spend	Match	Description				
	\$ 0.00	\$ 0.00					
3. Contractual	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
4. Travel & Per Diem	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
5. Supplies	\$ 0.00	\$ 0.00	\$ 55,000.00	\$ 0.00	\$ 55,000.00	\$ 0.00	\$ 55,000.00
GL Code / Activity	Spend	Match	Description				
	\$ 0.00	\$ 0.00					
6. Equipment	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

For every budget category in which you are submitting financial reporting (invoicing), you will need to save and upload the corresponding supporting documents at the bottom of the page. Be sure to save these documents as a PDF file using the budget category as a file name (i.e., filename “Contractual.pdf”). This file should contain all the supporting documents associated with the corresponding budget category. For Salaries & Wages and Benefits where the supporting documentation are the same for both categories, they can be uploaded as a single file named “Sal Ben.pdf”.

NOTE: For Forest Research grants with a Phase 1 and Phase 2 budget, know that you will only see the Phase 1 amounts in the Financial Report since they represent the current award. You can view your Phase 2 amounts with the View Budget button on the Award Dashboard

- 3) You will enter an Activity title and/or general ledger code along with its amount and description for each applicable expenditure in that spending category. Click the “+” icon to add another line item within that category
 - a. **GL Code/Activity:** enter the title of the invoice document and the page number/s that correspond with that line item (example: for the Salaries & Wages category, enter “Sal Ben – Pg. 1”)
 - i. For Salary and Benefits, if multiple people are listed in the supporting documents, break them out into separate line items
 - b. **Spend:** enter the total spending amount for that category
 - c. **Description:** enter description of invoice document according to spending category
 - i. “Personnel – [Employee name (if available) - expense period]”

- ii. “Benefits – [Employee name (if available) - expense period]”
- iii. For Contractual, enter “[vendor name] – [Invoice #]”
- iv. For Travel, enter “Mileage – [date of travel]”
- v. For Supplies, enter “[vendor name] – [Receipt # or date]”
- vi. For Equipment, enter “[vendor name] – [Invoice #]”
- vii. For Other, enter “[vendor name] – [Invoice #]”
- viii. For Indirect Cost, enter “Indirect – [indirect %]” for the GL Code/Activity and “Indirect” for the description

GL Code / Activity	Spend	Match	Description
Contractual - Pg. 2	\$ 50,400.00	\$ 0.00	Mattole Restoration Council - Inv. #17
Contractual - Pg. 3	\$ 72,400.00	\$ 0.00	Mattole Restoration Council - Inv. #18
Contractual - Pg. 4	\$ 50,800.00	\$ 0.00	Mattole Mattole Restoration Council - Inv. #19
Contractual - Pg. 5-7	\$ 17,241.47	\$ 0.00	Mattole Salmon Group - Inv. #20
Contractual - Pg. 9-10	\$ 484.12	\$ 0.00	Mattole Salmon Group - Inv. #21

NOTE: You will be unable to complete a financial report if you grant expenditures exceeds the amount budgeted by category even if it is within the 10% allowance. You will need to submit and be approved for a budget amendment before you can proceed with submitting a financial report. Refer to Chapter 6 for instructions on submitting a budget amendment.

- d. **Match:** if the spending category has a match amount, add a new line by clicking on the “+” button to the right of the description column
 - i. GL Code/Activity field: Enter “Match”
 - ii. Spend: Enter \$0
 - iii. Match: Enter the full amount of match reporting for the current invoice period for the category
 - iv. Description: Enter a brief description

GL Code / Activity	Spend	Match	Description
Match	\$ 0.00	\$ 22,434.20	Match

Repeat this process for each category that match is being reported.

NOTE: If you have an item of cost which is partially charged to the grant and partially used to provide match, you may enter that as a single line and identifying spend and match on the applicable columns.

- 4) Program Income earned for the financial report period should be reported in the Program Income field as both received and expended. You will also need to reduce an expenditure item by the corresponding amount and note which item of costs was reduced to account for the program income.

Program Income	Received	Expended
	\$ 77.35	\$ 77.35

For example, if you received \$77.35 in program income in the current reporting period, and expended \$500 in contractual costs, you would adjust the contractual costs to reflect \$422.65. In the budget narrative field, you will indicate “Contractual – Page 1 for Vendor XYZ reduced from \$500 to \$422.65 to account for Program Income earned of \$77.35.”

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	Award Approved	Match Approved	Award Remaining	Match Remaining	Total Remaining
5. Supplies	\$ 17,700.00	\$ 0.00	\$ 55,000.00	\$ 0.00	\$ 37,300.00	\$ 0.00	\$ 37,300.00
GL Code / Activity	Spend	Match	Description				
Example Item A	\$ 2,700.00	\$ 0.00	Example Item A		+ / -		
Example Item B	\$ 11,300.00	\$ 0.00	Example Item B		+ / -		
Example Item C	\$ 3,700.00	\$ 0.00	Example Item C		+ / -		
6. Equipment	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
7. Other Costs	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
8. Indirect Cost	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Report Total	Spend	Match	Total Award Approved	Total Match Approved	Total Award Remaining	Total Match Remaining	Total Remaining
	\$ 17,700.00	\$ 0.00	\$ 165,000.00	\$ 0.00	\$ 147,300.00	\$ 0.00	\$ 147,300.00
	100.00 %	0.00 %		0.00 %	89.27 %	0.00 %	89.27 %

- Once complete, check *Reimbursement Requests*. The box will auto populate with the amount from the spend column.

7. CONTRIBUTION	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
8. Other	\$ 5,000.00	\$ 0.00	\$ 5,000.00	\$ 5,000.00
Program Income	Received		Expended	
	\$ 0.00	\$ 0.00		
Report Total	Spend		Match	Spend + Match
	\$ 55,000.00	\$ 0.00	\$ 55,000.00	
	100.00 %	0.00 %		

Reimbursement Request*

\$ 55,000.00

This is my final report

- a. Reimbursement Request check box:
 - i) If you are not liquidating advance funds, check the 'Reimbursement Request' box and make sure the amount matches the total amount being requested on the invoice cover sheet
 - ii) If you are liquidating advance funds but your total spend does not exceed your outstanding advance, DO NOT check the "Reimbursement Request" box. The Report spend amount will be counted toward your outstanding advance.
 - iii) If you are liquidating advance funds and your total spend exceeds your outstanding advance, check the 'Reimbursement Request' box, and identify the amount in excess of the advance funds.

- b. Financial Report Narrative: Include any spending and/or program income details and a brief description about the reporting period's expense. If you are submitting a corresponding progress report for your grant (if applicable), please include a note in the narrative field.

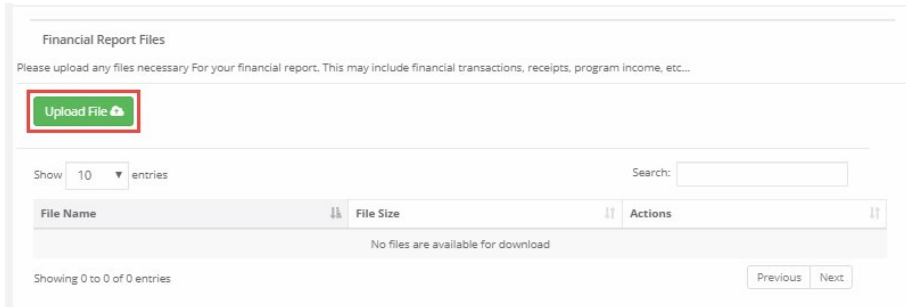
Note: If your report contains any corrections to prior financial reports (i.e. credit for returned items, etc.), please reach out to your applicable Program/Region contacts on how to reflect those costs and notations needed in the narrative prior to submitting your financial report.

Financial Report Narrative *

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

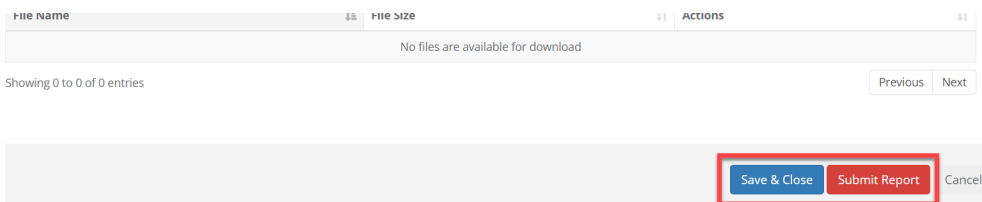
- 6) You will need to upload a signed invoice along with separate files for the cost categories which you are reporting costs for the grant. You can also upload any documents, including PDFs and scanned images to the Financial Report. Please do not use special characters in the filenames. Refer to your grant program’s guidelines regarding any additional required documentation or submittal methods for items other than invoice and supporting documentation. Click on “Upload File” to attach a document.

NOTE: Documentation for Indirect Costs is not necessary.

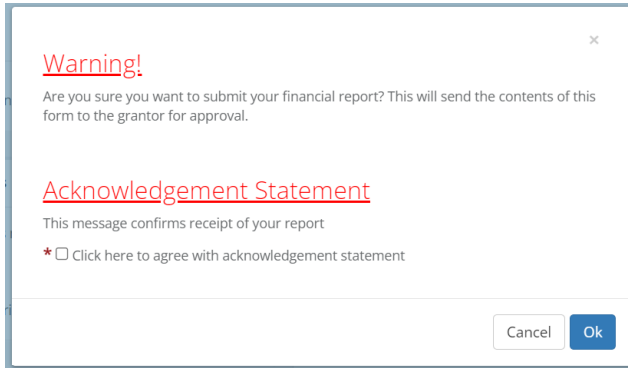


File Name	File Size	Actions
Contractual.pdf	55.7 KB	
Invoice.pdf	140.1 KB	
Other.pdf	1.4 MB	
Sal-Ben.pdf	103.2 KB	

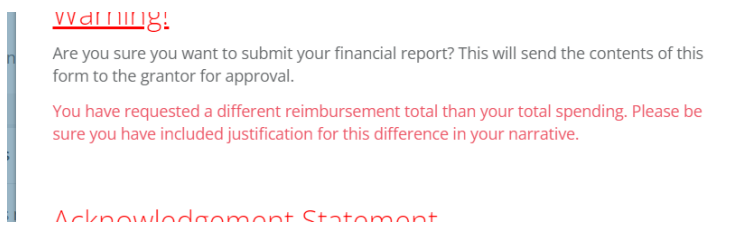
- 7) You may Save & Close the financial report to save a draft of your report and complete at another time. Or if you are finished, click “Submit Report”:



- 8) Review the final warning message, confirm the Acknowledge Statement with the provided checkbox and click OK to finish submitting the report.



NOTE: If you are submitting a financial report that is liquidating an advance, it may give you a warning message that the reimbursement request differs from the report spend. This is normal. Select OK.



- 9) You will be taken back to the Award Detail page, where the Financial Report will now be recorded under the Award Activities. By viewing the *Current Status* column of this table, you can monitor the progress of your report as it is approved and a payment disbursement is made. There are also corresponding actions available with each stage:

Award Activities

Report	Reporting Period	Created By	Date Created	Current Status	Actions
Financial Report	05/01/2019 – 05/31/2019	Ulysses Grant	07/09/2019	Approved / Awaiting Payment	View Report
Financial Report	06/01/2019 – 06/30/2019	Ulysses Grant	07/09/2019	Approved / Paid	View Report
Financial Report	07/03/2019 – 07/03/2019	Ulysses Grant	09/16/2019	Pending Approval	View Report
Financial Report	05/01/2019 – 05/31/2019	Ulysses Grant	08/26/2019	Changes Requested	Review/Resubmit
Financial Report	07/01/2019 – 07/31/2019	Ulysses Grant	07/09/2019	Rejected	View Report
Activity Report	09/01/2019 – 09/30/2019	Ulysses Grant	09/16/2019	Approved	View Report

Showing 1 to 6 of 6 entries

Previous 1 Next

Reload

NOTE: These columns can be reorganized by clicking on any column title.

- 1. Report:** Type of report. Also referred to as invoices.
- 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:

- **Draft:** the report has been created but not yet submitted to CAL FIRE for review.
- **Pending Approval:** the report has been submitted to CAL FIRE and is being reviewed.
- **Approved:** the report has been approved by CAL FIRE. No payment will be issued by CAL FIRE (typically financial report is liquidating advance funds with no additional reimbursement requested by grantee).
- **Approved/Awaiting Payment:** CAL FIRE has approved the report but has not processed payment.
- **Approved/Paid:** CAL FIRE has approved the report and payment has been issued to the grantee.
- **Changes Requested:** The funding agency needs more information.
- **Rejected:** The report has been rejected and cannot be re-submitted. If you click to "View Report", a note from CAL FIRE may have been provided on the report to explain the reason for the rejection.

6. Actions:

- **Edit Report:** For reports in draft status, this option opens the report to continue working on it and eventually submit
- **Review/Resubmit:** If a report has changes requested by CAL FIRE, the grantee will have the opportunity to edit the rejected report and resubmit it. The report will contain a comment from CAL FIRE above the report table that details the request.

Financial Report Details **Changes Requested**

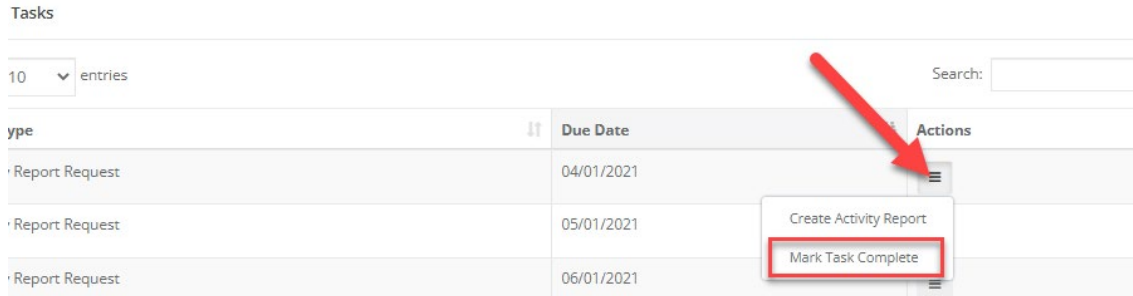
Note from the grantor:
 you uploaded the wrong document, please resubmit.

Reporting Period: 03/01/2021 - 03/31/2021

Category	Spend	Match	Award Approved	Match Approved	Award
1. Personnel	\$ 2,600.00	\$ 0.00	\$ 60,000.00	\$ 0.00	\$

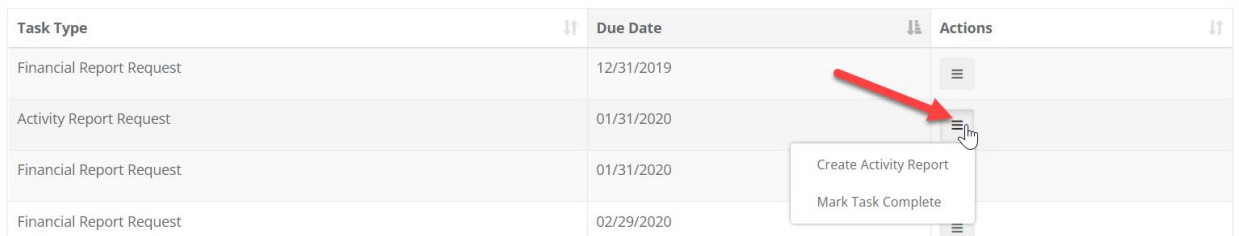
- **View Report:** Any report that is submitted and is not in a status of Changes Requested will have only the option to view the submitted report and any comments added in response by CAL FIRE.

10) If you happened to create your Financial Report from the buttons at the top of your Award Dashboard, you will still have to address the pending task due for that Financial Report request. In your *Pending Tasks* table, click on the Actions icon next to that task and click “Mark Task Complete”:

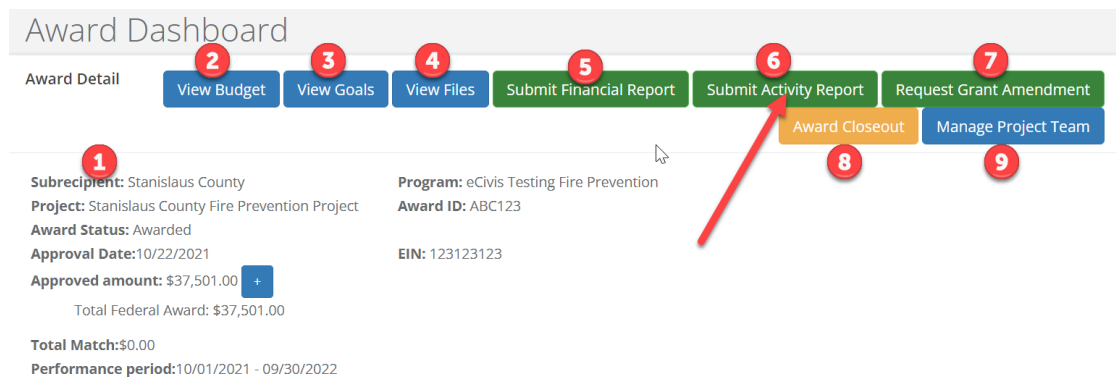


5.2. Submitting Activity Reports

1) On the Pending Tasks table of the Award Dashboard, locate the Activity Report request that is due and click the Actions menu. Select *Create Activity Report*.



a. If a task is not present, then at the top right of your grant’s *Award Dashboard*, click “Submit Activity Report”:



- 2) Complete the following form and attach any pertinent files. Please refer to the applicable grant guidelines for specific files that must be submitted.

Activity Report

Reporting Period: *

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

Report Narrative: *

<> H1 H2 H3 B I U

- 3) Update any Goal/Activity Metrics
 - a. Most goals will have subgoals which will require you to click a “+” icon (shown on the right in below image) to add rows to report on a subgoal.
 - b. The left-hand dropdown lists the available subgoals so you can select an item to enter data for that row.
 - c. Proceed to fill in the *Completed Units* that were achieved during this reporting period along with the *Award Spend*, *Match Spend*, and *Program Income* that were spent to achieve this outcome during this specific reporting period

NOTE: Not all programs are currently requiring completing of the goal/activity metrics. Please reach out to your CAL FIRE contact if you have any questions on whether you are required to complete this for your award.

Activity Report Metrics

Please enter metrics to describe progress on your goals.

Goal / Objective	Completed Units	Award Spend	Match Spend	Program Income Spend
a) Acres of Biomass Utilization	32.50	\$ 63,500.00	\$ 8,000.00	\$ 0.00
Subgoal / Activity	Completed Units	Award Spend	Match Spend	Program Income Spend
a01) Biomass Removal	8.50	\$ 30,000.00	\$ 5,000.00	\$ 0.00 <input type="button" value="+"/> <input type="button" value="-"/>
a02) Biomass Removal	11.00	\$ 16,000.00	\$ 0.00	\$ 0.00 <input type="button" value="+"/> <input type="button" value="-"/>
a03) Biomass Removal	13.00	\$ 17,500.00	\$ 3,000.00	\$ 0.00 <input type="button" value="+"/> <input type="button" value="-"/>
Goal / Objective	Completed Units	Award Spend	Match Spend	Program Income Spend
b) Acres of Fuels Reduction	0.00	\$ 0.00	\$ 0.00	\$ 0.00
Subgoal / Activity	Completed Units	Award Spend	Match Spend	Program Income Spend
b02) Commercial Thinn	0.00	\$ 0.00	\$ 0.00	\$ 0.00 <input type="button" value="+"/> <input type="button" value="-"/>
b01) Chipping				
b02) Commercial Thinning (Tractor Yarding)				

- 4) Lastly, attach any Activity Report Files by clicking the green *Upload File* button (refer to your grant program’s guidelines to see any required documentation).

Activity Report Files

Please upload any files necessary for your activity report.

Show 10 entries

File Name	File Size	Actions
No files are available for download		

- 5) Click “Submit Report”:

- 6) Review the Warning message and click OK to finish submitting the report.

Warning!

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

- 7) You will be taken back to the Award Detail page, where the Activity Report will now be recorded under the Award Activities. By viewing the *Current Status* column of this table, you can monitor the progress of your report as it is approved. There are also corresponding actions available with each stage:

Award Activities

Show: 10 entries

Search:

Report 1	Reporting Period 2	Created By 3	Date Created 4	Current Status 5	Actions 6
Financial Report	05/01/2019 – 05/31/2019	Ulysses Grant	07/09/2019	Approved / Awaiting Payment	View Report
Financial Report	06/01/2019 – 06/30/2019	Ulysses Grant	07/09/2019	Approved / Paid	View Report
Financial Report	07/03/2019 – 07/03/2019	Ulysses Grant	09/16/2019	Pending Approval	View Report
Financial Report	05/01/2019 – 05/31/2019	Ulysses Grant	08/26/2019	Changes Requested	Review/Resubmit
Financial Report	07/01/2019 – 07/31/2019	Ulysses Grant	07/09/2019	Rejected	View Report
Activity Report	09/01/2019 – 09/30/2019	Ulysses Grant	09/16/2019	Approved	View Report

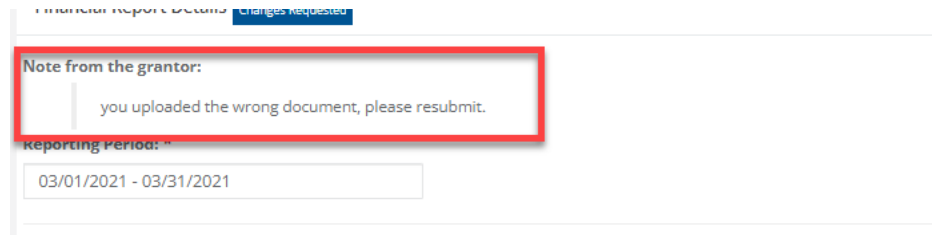
Showing 1 to 6 of 6 entries

Previous 1 Next

Reload

NOTE: These columns can be reorganized by clicking on any column title.

1. **Report:** Type of report. Also referred to as invoices.
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:**
 - **Draft:** the report has been created but not yet submitted to CAL FIRE for review.
 - **Pending Approval:** the report has been submitted to CAL FIRE and is being reviewed.
 - **Approved:** the report has been approved by CAL FIRE.
 - **Changes Requested:** The funding agency needs more information.
 - **Rejected:** The report has been rejected and cannot be re-submitted. If you click to “View Report”, a note from CAL FIRE may have been provided on the report to explain the reason for the rejection.
6. **Actions:**
 - **Edit Report:** For reports in draft status, this option opens the report to continue working on it and eventually submit
 - **Review/Resubmit:** If a report has changes requested by CAL FIRE, the grantee will have the opportunity to edit the rejected report and resubmit it. The report will contain a comment from CAL FIRE above the report table that details the request.



- **View Report:** Any report that is submitted and is not in a status of Changes Requested will have only the option to view the submitted report and any comments added in response by CAL FIRE

- 8) If you happened to create your Activity Report from the buttons at the top of your Award Dashboard, you may still have to address the pending task due for that Activity Report request. In your *Pending Tasks* table, click on the Actions icon next to that task and click "Mark Task Complete":

Task Type	Due Date	Actions
Activity Report Request	09/30/2020	⋮
Activity Report Request	12/31/2020	⋮

Showing 1 to 2 of 2 entries

5.3. Miscellaneous Tasks

Miscellaneous tasks are assigned for any deliverables outside of regular Financial and Activity reporting. Any assigned miscellaneous tasks will be included in your pending tasks list.

- 1) Click the Actions icon next to the task name.

Pending Tasks

Show 25 entries Search:

Task Type	Due Date	Actions
Financial Report Request	10/31/2024	⋮
Activity Report Request	01/31/2025	⋮
Financial Report Request	01/31/2025	⋮
Closeout Approval	03/31/2025	⋮
Advance Payment Request	03/31/2025	⋮

Showing 26 to 30 of 30 entries

- 2) Read the task description (1), enter your report narrative (2), upload your supporting documentation according to grant guidelines and task description (3), and click Submit Form (4).

Advance Payment Approval - 11/19/2021

Task Note:
Here is what you need to provide... 1

Subrecipient Response: * 2

8000 characters remaining

Task Files 3

Please upload any files necessary for your task. *

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

Submit Task Cancel 4

Examples of Miscellaneous Tasks you may see in your pending tasks may include, but not limited to:

- Advance Payment Requests – optional task for grantees to request advance funds, if eligible, to work on the grant project
- Advance Payment Accountability Report – task required for grantees of certain programs that have received advance funds
- Jobs Reporting – task required to report jobs benefits for certain grant awards

If you think that there are tasks that are missing in your pending lists, please contact your CAL FIRE Program so that we can have the task added to your list.

6. How do I request an amendment to my grant award & agreement?

Prior to submitting an amendment, it is highly recommended to talk to your CAL FIRE Program contact to determine whether an amendment for your project is possible and documentation that will be needed.

- 1) To submit a grant amendment, click on “Request Grant Amendment” from the applicable *Award Dashboard*:

The screenshot shows the 'Award Dashboard' with a navigation bar containing buttons: 'View Budget' (2), 'View Goals' (3), 'View Files' (4), 'Submit Financial Report' (5), 'Submit Activity Report' (6), 'Request Grant Amendment' (7), 'Award Closeout' (8), and 'Manage Project Team' (9). A red arrow points to the 'Request Grant Amendment' button. Below the navigation bar, the 'Award Detail' section (1) displays the following information:

- Subrecipient:** Stanislaus County
- Project:** Stanislaus County Fire Prevention Project
- Award Status:** Awarded
- Approval Date:** 10/22/2021
- Approved amount:** \$37,501.00 (+)
- Total Federal Award:** \$37,501.00
- Program:** eCivis Testing Fire Prevention
- Award ID:** ABC123
- EIN:** 123123123
- Total Match:** \$0.00
- Performance period:** 10/01/2021 - 09/30/2022

- 2) Verify the basic award details. If you are requesting an extension to your grant expiration date, please change the date on the “Performance Period End” to the requested date. Click “Save and Continue”:

The 'Grant Amendment' section shows a progress bar with four steps: 'AWARD DETAILS', 'FINANCIAL INFORMATION', 'FINALIZE GOALS', and 'ATTACH FILES'. Below the progress bar, the text reads: 'Please edit the appropriate information below.' The form contains the following fields:

- Organization Name:** Stanislaus County
- Project Name:** Stanislaus County Fire Preventic
- EIN:** 123123123
- Performance Period End:** 09/30/2022

A 'Save and Continue' button is located at the bottom right of the form.

- 3) On the Financial Information page, if you need to request adjustments to your budget, check the “This amendment includes a financial change” box. This will allow you to submit a budget modification for approval. (See Chapter 2.2 *Accepting/Declining My Award* for guidance on amending your budget)

AWARD DETAILS FINANCIAL INFORMATION ATTACH FILES

This amendment includes a financial change




Budget Settings

Multi-Term Budget: No Yes

Indirect Costs: Not Applicable 0.00 %

Match / Cost Share: Not Applicable 0.00 % \$ 0.00

Budget Stage: Post-Award

Actions:   

Budget Summary

\$45,000.00 Total Direct Costs

\$0.00 Total Indirect Costs

\$45,000.00 Total Amount (Direct + Indirect)

\$0.00 Match / Cost Share

\$0.00 Program Income

Budget Items

1. Administrative and Legal Expenses

	Ext Cost	Direct Cost	Ind Cost	Cost Share
Administrative and Legal Expenses	\$27,500.00	\$45,000.00	\$0.00	\$0.00
Totals:				

Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Item Type
Legal Expenses	n/a	5.00	\$5,500.00	\$27,500.00	\$45,000.00		Direct Cost

[Add Row](#)

4) If your award contains goals for program activity, you will then be able to amend your target goals.

DOWNLOAD FILES FINALIZE BUDGET FINALIZE GOALS ATTACH FILES

Please review your goals

Goal	Target	Direct Cost Expenditure	Matching Expenditure	Program Income Expenditure
a) Acres of Biomass Utilization :	<input type="text" value="258.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>
a01) Biomass Removal (Biochar):	<input type="text" value="60.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>
a02) Biomass Removal (Electricity):	<input type="text" value="30.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>
a03) Biomass Removal (Heat):	<input type="text" value="20.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>
a04) Biomass Removal (Renewable Fuels):	<input type="text" value="10.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>
a05) Biomass Removal (Wood Products):	<input type="text" value="20.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>
a06) Piling (Manual):	<input type="text" value="30.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>

5) Lastly, upload any documentation needed to support the amendment by clicking the "Upload File" button (refer to your grant program's guidelines to see any

required documentation), include additional notes/clarification in the narrative, and click “Submit Amendment”.

Grant Amendment

AWARD DETAILS FINANCIAL INFORMATION ATTACH FILES

Please upload any files necessary to include with your grant amendment. These documents will be added to your original award package. It is highly recommended that you include a narrative explaining your grant amendment request.

Upload File

Amendment Files

Show 10 entries Search:

File Name	File Size	Actions
No files have been uploaded		

Showing 0 to 0 of 0 entries Previous Next

Amendment Narrative:
You can include a narrative below with any extra information about the amendment.

Rich text editor with toolbar (H1, H2, H3, B, I, U, list, link, unlink, undo, redo)

8000 characters remaining

Back **Submit Amendment**

6) Include any final notes for the grantor to consider and click “Save”:

Submit Amendment

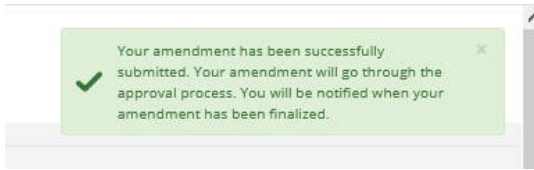
Are you sure you are ready to submit this amendment? Please ensure you have all necessary budget and documentation completed before sending this amendment for grantor approval. You may enter an optional note to the approver:

Rich text editor

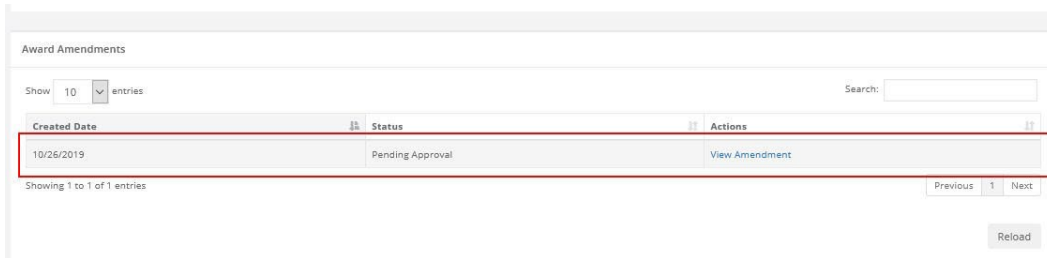
5000 characters remaining.

Cancel **Save**

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



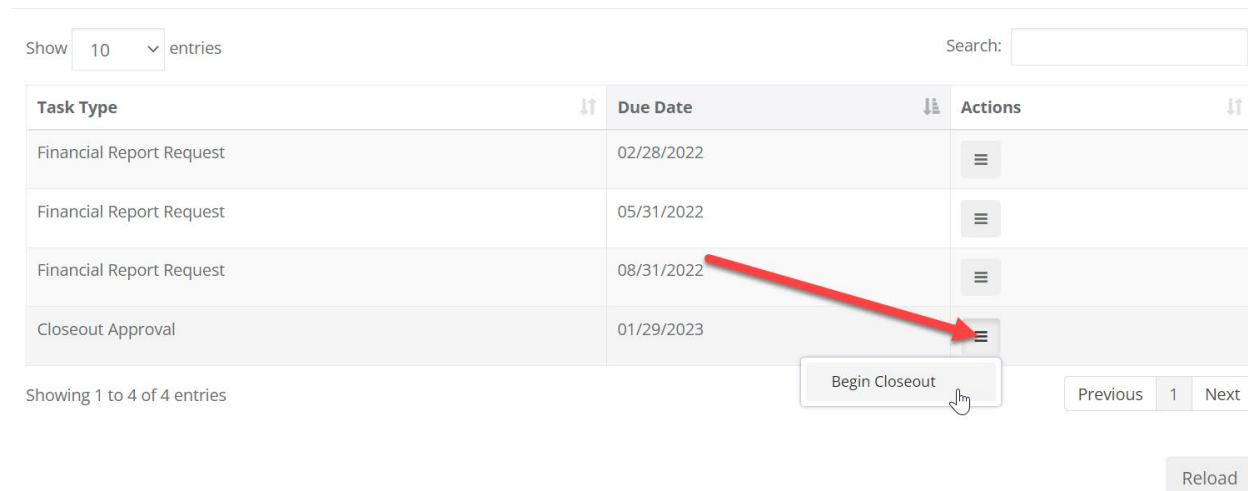
8) You can locate the status of your Amendment in the Award Amendments section:



7. How do I close out my Grant?

When you are ready to close out your grant, note that any funds that are remaining and unspent will be de-obligated and returned to CAL FIRE.

1) To begin the process, look for a pending task titled "Closeout Approval", click the Actions icon beside that task to open the menu and select "Begin Closeout".



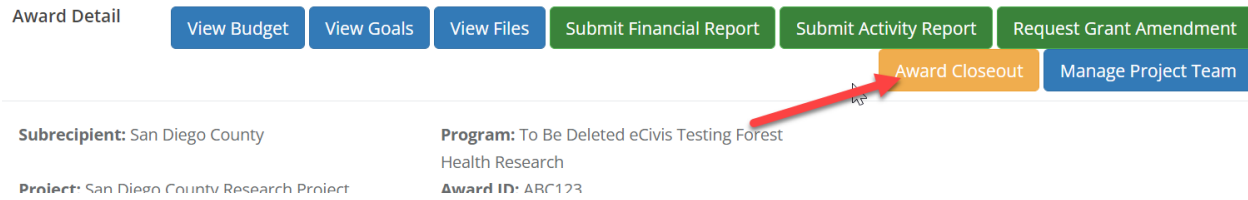
2) If the above option is not present, you can click the Award Closeout button from the header of the Award Dashboard.

Award Dashboard

Award Detail

[View Budget](#) [View Goals](#) [View Files](#) [Submit Financial Report](#) [Submit Activity Report](#) [Request Grant Amendment](#)
[Award Closeout](#) [Manage Project Team](#)

Subrecipient: San Diego County **Program:** To Be Deleted eCivis Testing Forest
Health Research
Project: San Diego County Research Project **Award ID:** ABC123



- 3) A warning message will appear, and you will be required to click “OK” if you wish to continue. The message reads:

“Are you sure you want to close this grant? This process will walk you through submitting your final financial report. You will not be able to submit further activity reports or complete pending tasks. Any unspent funding will be deobligated and returned to the grantor.”

Warning!

Are you sure you want to close this grant? This process will walk you through submitting your final financial report. You will not be able to submit further activity reports or complete pending tasks. Any unspent funding will be deobligated and returned to the grantor.

[Cancel](#) [OK](#)

- 4) You will then be taken to your closeout report in the format of a Financial Report. (See Chapter 5: *How do I submit financial reports to CAL FIRE?* for instructions on filling out the contents).

Financial Report

Award Detail

[Back to Award Detail](#)

 **Rest Health Research** Awarded
 Awarded by: California Department of Forestry and Fire Protection (CAL FIRE)
 Approved amount: \$72,740.00
 Match type:
 Performance period: 11/01/2021 -10/31/2022

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	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>
	<input type="text" value="0%"/>	<input type="text" value="0%"/>	
Award Remaining	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>
Award Total Program Income	Received \$ <input type="text" value="0.00"/>	Expended \$ <input type="text" value="0.00"/>	

a. You will see a warning page above the spending table that reads:

ATTENTION: This is your final financial report. Please be sure you have completed all necessary performance reporting and assigned tasks prior to submitting this report. Any unspent funding will be unavailable for reimbursement after this report has been submitted.

Financial Report Details

⚠ ATTENTION: This is your final financial report. Please be sure you have completed all necessary performance reporting and assigned tasks prior to submitting this report. Any unspent funding will be unavailable for reimbursement after this report has been submitted.

Reporting Period: *

Category	Spend	Match	Spend + Match	Award Remaining
1. Salaries & Wages	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
2. Employee Benefits	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
3. Contractual	\$ 0.00	\$ 0.00	\$ 0.00	\$ 38,240.00
GL Code / Activity	Spend	Match	Description	
<input type="text"/>	\$ 0.00	\$ 0.00	<input type="text"/>	<input type="button" value="+"/> / <input type="button" value="-"/>

b. Click Submit Report .

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](#)

[Save & Close](#) [Submit Report](#) [Cancel](#)

c. Once submitted, the Award Dashboard will show only the buttons for viewing your award details such as the Budget, Files, submitted reports, etc. The Pending Task section will disappear as well, and a message will display in its place that reads:

This award has begun closeout. During this time, you may not complete further tasks or reporting. Your grantor is currently reviewing your final report. Please contact them directly if you have any questions during this process.

Award Dashboard

Award Detail [View Budget](#) [View Files](#)

Subrecipient: San Diego County	Program: Forest Health Research
Project: San Diego County Research Project	Award ID: ABC123
Award Status: Closeout	EIN: 234234234
Approval Date: 11/11/2021	
Approved amount: \$72,740.00 +	
Total Non-Federal Award: \$72,740.00	
Total Match: \$0.00	
Performance period: 11/01/2021 - 10/31/2022	

This award has begun closeout. During this time you may not complete further tasks or reporting. Your grantor is currently reviewing your final report. Please contact them directly if you have any questions during this process.

- e. Below are options for exporting and printing your historical award information:
- i. If you click *View Budget*, you will be able to export the table using the *Excel Export* button.

Application Budget for San Diego County

Program: [Fire Management Planning](#) Forest Health Research
Project name: San Diego County Research Project

[Return to Awards](#)

Budget Stage: Post-Award

Actions



And you may export the Budget Narrative using the PDF export button.

Budget Narrative


Enter your budget narrative below.

A large text area containing several lines of blurred text, representing the budget narrative input field.

- ii. If you click View Files, a pop-up will appear where you can click the download icon on each file you need.

The grantor has attached the following files for you to download.

Award Files

File Name	File Size	Stage	Uploaded By	Actions
Approval File: awardNotification.pdf				

- iii. If you click on a report using the *View Report* button from the *Award Activities* table on the *Award Dashboard*, you can print the report by pressing CTRL on your keyboard.

NOTE: It is recommended to print in Landscape rather than Portrait mode if using a standard PDF/Paper size. The tables on these pages are wide and can cut off information if the printing format is not set up accordingly.

Award Activities

Show 10 entries

Search:

Report	Reporting Period	Created By	Date Created	Current Status	Actions
Financial Report	11/11/2021 -- 12/21/2021	Jan Smith	11/11/2021	Pending Approval	View Report

e. Once your closeout report is approved, you will receive a notification by email and the message on your Award Dashboard will then read:

“This award has finished closeout. Please contact your grantor directly if you have any questions”

This is the end of your grant management activities for this award.

Approved amount: \$164,500.00
Total Federal Award: \$148,500.00
Total Non-Federal Award: \$16,000.00
Total Match: \$0.00
Performance period: 03/01/2020 - 03/01/2025

This award has finished closeout. Please contact your grantor directly if you have any questions.

Award Activities

Show 10 entries

Search:

Glossary of Terms

Term	Definition
Activity Report	Also referred to as Progress Report. A summary of activities performed over a given period of time (usually defined by Grantor) and submitted for review by the Grantee.
Amendment	A written request to modify an awarded grant. Grant amendments may include budget modifications, changes to scope of work, no-cost time extensions, and goals.
Amendment Narrative	A written description that details your request for a grant amendment.
Award	Financial assistance that provides support or stimulation to accomplish a public purpose.
Award Notification Letter	Official notification from Grantor that recipient has been accepted and outlines the award details.
Award Dashboard	In Portal, the Award Dashboard allows users to view their funding details, budget, submit new financial reports, submit activity reports, and view team members who have access to the award.
Budget	The financial plan for the project or program that the Federal awarding agency or pass-through entity approves during the Federal award process or in subsequent amendments to the Federal award. It may include the Federal and non-Federal share or only the Federal share, as determined by the Federal awarding agency or pass-through entity.
Budget Category	A section that offers categories to enter your line items.
Budget Extended Cost	This is indented to represent the total item cost, which could differ from the budgeted amount.
Budget Line Item Title	Title of your bookkeeping ledger or an item of expenditure in your budget.
Budget Line Item Description	Allows you to enter a description of the budgeted item.
Budget Narrative	Explains in a clear and concise manner the costs in each budget category, and which budget items will be covered by the grant and which ones will be covered by matching funds (e.g., cost-share or in-kind).
Budget Line Item Unit	The specific amount of the budgeted line item. If more than one, you can enter multiple units.
Budget Line Item Unit Cost	Per unit cost (NOTE: if Unit and Unit Cost is used, the Cost field will be populated with the Unit number multiplied by the Unit Cost).
Budget Worksheet	The budget component of the application that outlines the financial plan for the project or program.

Cash Match	The portion of project costs not paid by Federal funds (unless otherwise authorized by Federal statute).
Cost Field	A field where you can enter the amount for each line item.
Cost Share	Also referred to as match funds. This field can be calculated in different ways based on your budget settings. If included as a percentage, you can check or uncheck this field to include it in your total Cost Share. If included as Itemized, you can put any amount desired for this item in the Cost Share field. If included as Not Applicable, you can mark this budget item as Cost Share and the amount entered in the Cost field will be included in your total Cost Share.
De Minimus Rate	This is the standard indirect cost rate that can be used for a Federal Grant if you do not have a negotiated rate.
eCivis Portal Account	An online service which allows interested applicants to create a free account so they can save, collaborate, and apply for program solicitations.
Employer Identification Number (E.I.N.)	E.I.N., also known as a Federal Tax Identification Number, is used to identify a business entity.
Financial Report	A report that tracks spending and reimbursement requests that the subrecipient will send to the grantor from Portal. Another name that is related is the Program Progress report (see Program Progress Report). Report will be used to submit all invoices.
Financial Report Narrative	A detailed description of grant related expenditures.
General Ledger or GL	Number used to identify this budget category in your financial system.
Grant	A sum of money given from one entity to another for a particular purpose or goal.
Grantor	A person, organization, institution, or agency providing a sum of money for a particular purpose or goal. In eCivis Grants Network, this is an organization who is offering a program solicitation. For the purposes of this user guide, CAL FIRE is considered the grantor.
In-Kind Match	Third-party in-kind contributions means the value of non-cash contributions (i.e., property or services) that- (a) Benefit a federally assisted project or program; and (b) Are contributed by non-Federal third parties, without charge, to a non-Federal entity under a Federal award.
Itemized	This will change the indirect cost calculation from a percentage to a manual entry amount.

My Awards	Access to all the programs that you have been awarded.
My Profile	Access to your profile information.
Negotiated Rate	This should be used if you have negotiated an indirect cost rate with the agency you are applying to.
Not Applicable	Used on the grant budget. This will remove indirect costs from overall calculation and allow you to enter it as a line item entry. If this is selected, an option will be made available in each line item to indicate the type of item it is (Direct Cost, Indirect Cost, or Cost Share).
Owner	Owner who submitted the application and is tracking and managing the award.
Pending Award	A portion of funds that have been offered to a subrecipient but have not yet been finalized through a formal award process.
Performance Period	The period established in the award document during which CAL FIRE's sponsorship begins and ends.
Program Administrator	The individual responsible for planning, implementing, and evaluating the grant program.
Program Income	Sum of program income line items listed in the Program Income section. Represents revenue generated as a result of the grant funds provided. Program income may include but not limited to interest income from advanced funds, sale of forest products resulting from implementation of grant project, etc.
Program Officer	The person who is responsible for overseeing program development, seeking grants and submitting proposals, managing projects and overseeing budgets.
Portal Profile	Information that is entered by Portal user, which will be used when submitting application for review and consideration.
Reimbursement	Reimbursements are provided for project expenses on a set payment schedule after the organization has submitted sufficient documents to verify expenses.
Reimbursement Request	A form completed in the Portal Account requesting reimbursement from the Grantor for grant related expenses.
Role	This defines who the user is in a Portal account.
Team Member	Not the original applicant. This is a user added to a Portal Account to assist and collaborate on the awarded grants. These individuals are invited to help track the award and submit reports.
Total Direct Costs	Sum of all Direct Cost across all budget categories.
Total Indirect Costs	Sum of all Indirect Costs across all budget categories.
Total Proposed	Sum of all Direct Costs and Indirect Costs across all budget categories.