

eCivis Grants Portal

CAL FIRE Applicant

User Guide

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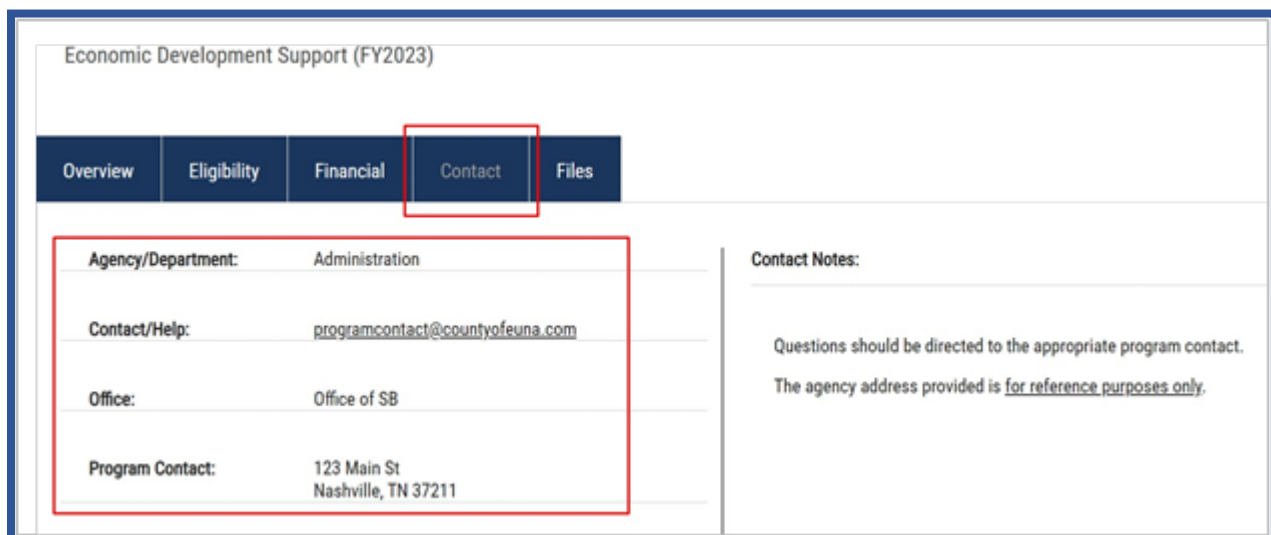
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About eCivis Grants Portal

For grant solicitations distributed through the eCivis *Grants Portal* system, applicants and grantees have a simple and effective way to manage their applications and the entire lifecycle of their grants. Key features include:

- 1) Free and simple account creation
- 2) Detailed, yet organized program solicitation information
- 3) Invite other portal accounts to view/collaborate on applications and awards
- 4) Keep track of all your past submissions and export copies as needed
- 5) Accept awards, track performance, and submit reports—incorporating the same forms you filled when applying
- 6) Submit requests for reimbursement and track their progress
- 7) Request award amendments and track their progress
- 8) Close out grant projects in collaboration with your granting agency

The chapters that follow will walk through the application process step-by-step. If you have any questions or experience any issues along the way, it is recommended that you contact your grant program administrators (often listed on the *Contact* tab of the solicitation).



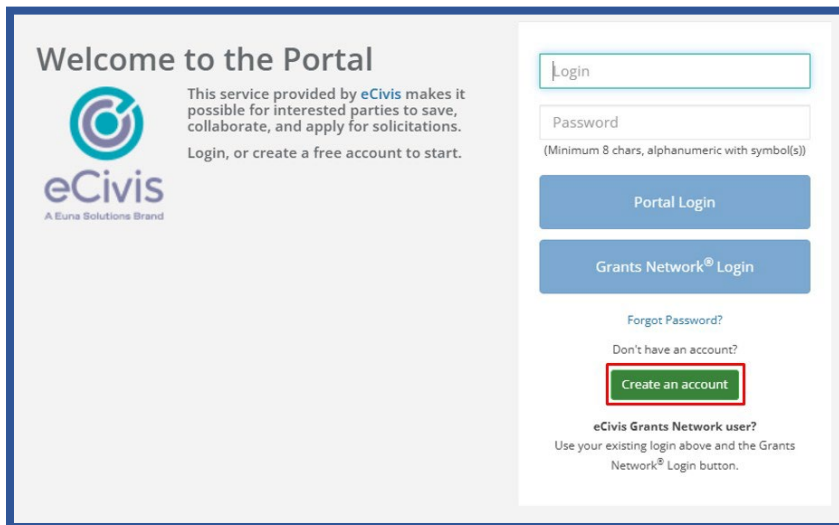
Economic Development Support (FY2023)				
Overview	Eligibility	Financial	Contact	Files
Agency/Department:	Administration			
Contact/Help:	programcontact@countyofeuna.com			
Office:	Office of SB			
Program Contact:	123 Main St Nashville, TN 37211			
Contact Notes:	Questions should be directed to the appropriate program contact. The agency address provided is for reference purposes only.			

1. Creating an eCivis Portal Account

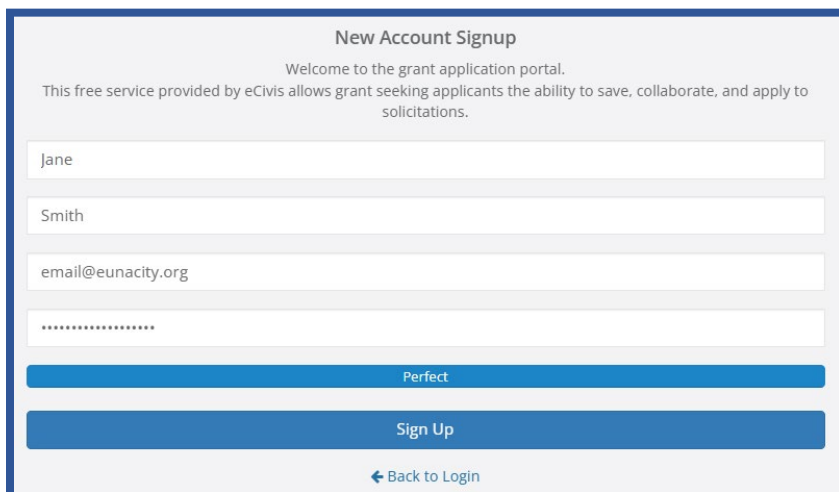
If you are applying for a CAL FIRE grant program solicitation, you will need to set up a *Portal* account at <https://portal.ecivis.com/#/login>. Use the **Forgot Password?** link if you have an existing account but need to reset your password).

NOTE: eCivis *Grants Network* users can use their *Grants Network* credentials instead of creating a new *Grants Portal* account. To do this, click on the **Grants Network Login** button and skip to the “Setting up your account profile information” step in the *My Profile* instructions below. If you need to reset that password, visit <https://gn.ecivis.com> and click the **Forgot Login Info** link on that page.

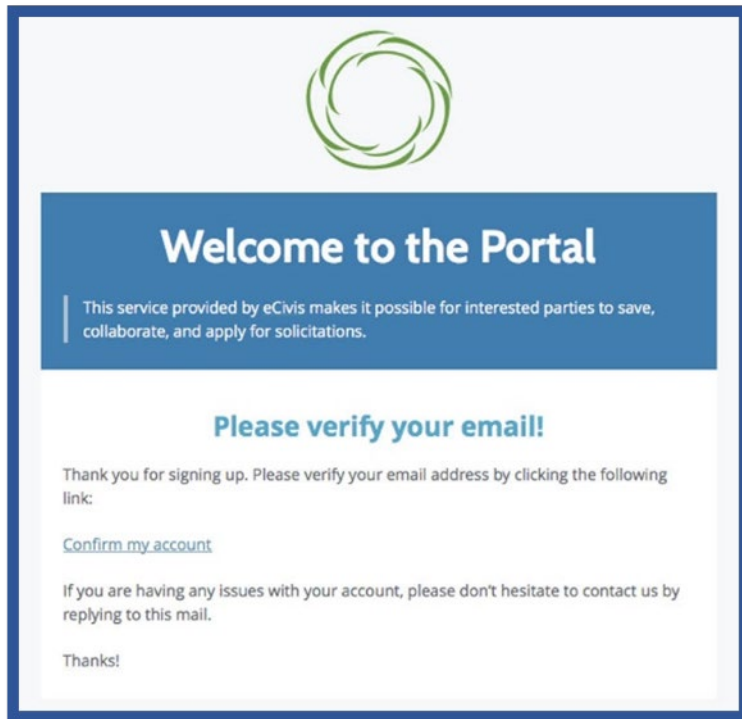
- 1) Click on the **Create an account** button.



- 2) Enter your name, email, and desired password. Then click on the **Sign Up** button.

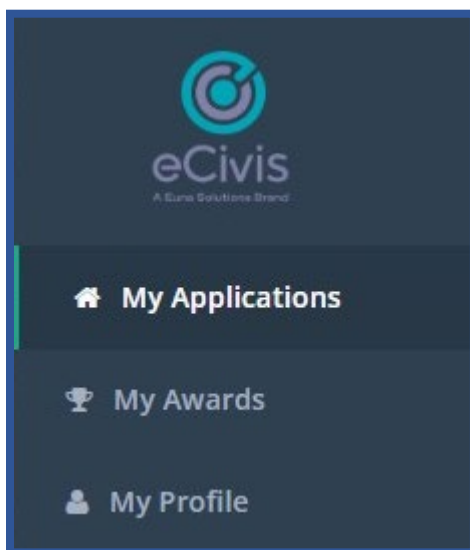


- 3) This will send you a confirmation email. You will need to click on the link within that confirmation email to activate your account.



NOTE: If you do not see this email within a few minutes, check your spam/junk folder in your email inbox.

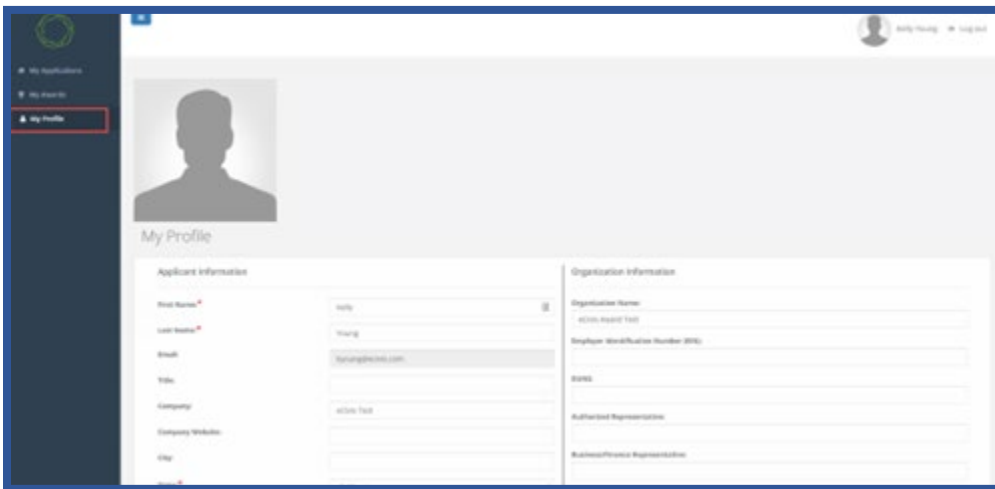
- 4) When you log into *Portal*, you will see a navigation bar on the left of your screen.



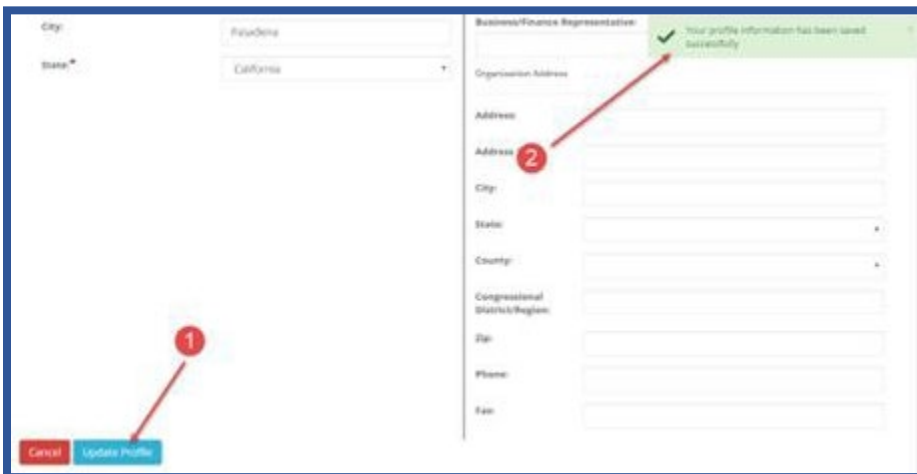
- a. **My Applications:** Gives you access to all applications and program solicitations in your Portal account.
- b. **My Awards:** Gives you access to all the program solicitations where you were awarded.
- c. **My Profile:** Gives you access to your profile information.

5) Setting up your account profile information in the *My Profile* section:

- a. Ensure that the required fields within the *My Profile* section are complete before continuing onto any applications.



- b. Then, click on the **Update Profile** button on the bottom of the screen.
- c. A green success message should appear in the top right corner of your screen.



- 6) If you ever need to edit your profile, you can do so by clicking on **My Profile** on the left-side navigation bar within *Portal*.

NOTE: Information entered on this page will automatically be ported into each new application profile you create using *Portal*. The application profile information may be edited for individual applications during the application process.

1.1. What if I forgot my password?

Click on the **Forgot Password** link, 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?
Like 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. Reviewing the Program Solicitation

The program solicitation provides important information to anticipate the work required in applying for and (if awarded) managing an award from this solicitation. You will also find any necessary file downloads or helpful information to determine if your organization and project are eligible.

State of EUNA 1

Economic Development FY2024 - ED04

Overview | Eligibility | Financial | Contact | Files

ID:	ED-2345-6789	Summary: Economic Development FY2024 - ED04 will provide small businesses with funding to support economic growth in Euna City through business coaching, training programs, and informational resources.
Title:	Economic Development FY2024 - ED04	
Application Start Date:	04/01/2024	
Application End Date:	07/31/2024	
CFDA/ALN:	12.345	
Reference URL:	https://eunasolutions.com/	

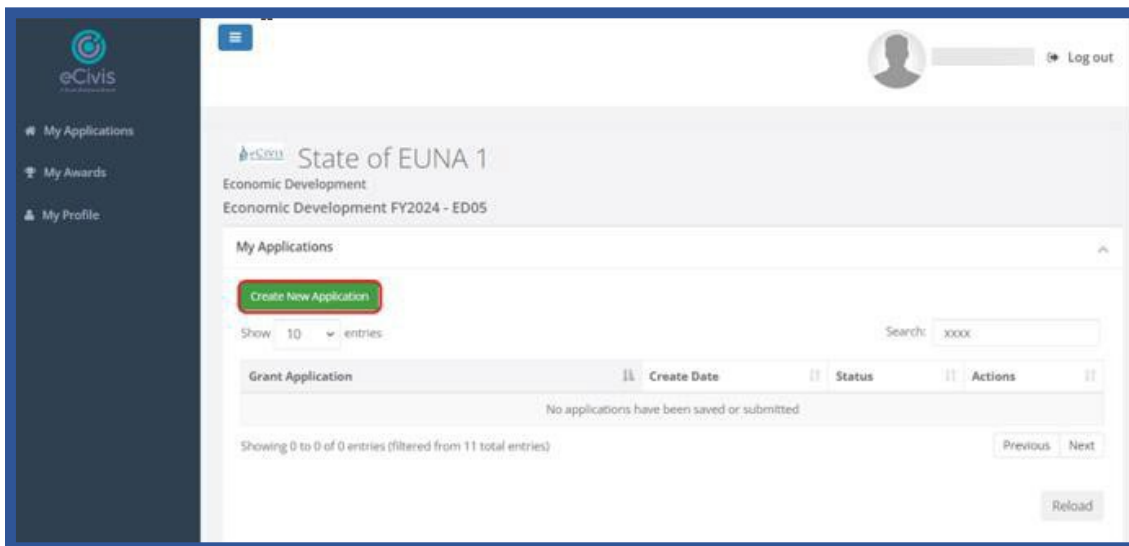
* eCivis Inc. is not responsible or liable for user-generated content.

3. Starting a New Application

- 1) Click the **Apply** button on the grant program's solicitation page to begin the application process in the eCivis *Portal*.

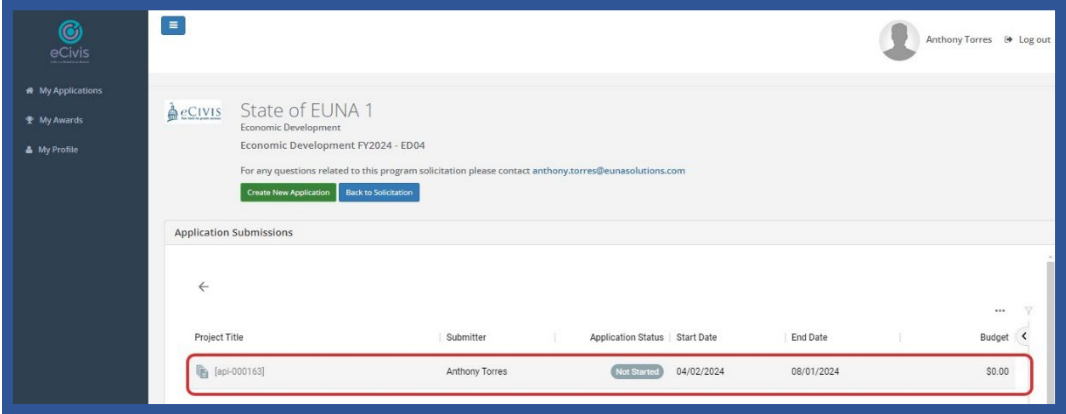


- 2) Log into your *Portal* account using the instructions from Chapter 1: Creating an Account.
- 3) Click on the **Create New Application** button.

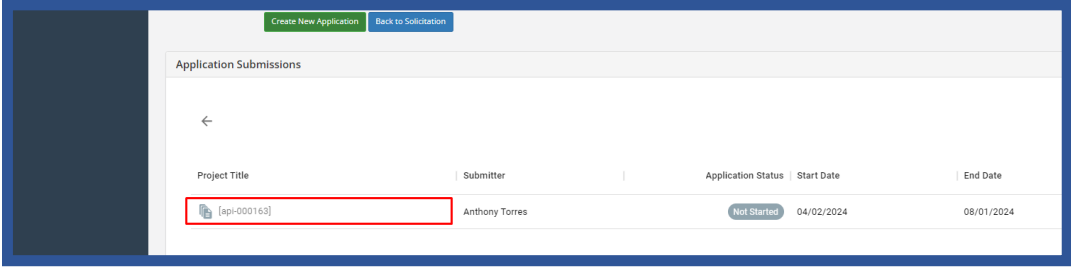


- 4) The new application will appear in the *Application Submissions* table.

NOTE: If the solicitation allows multiple application submissions from the same applicant, this table will list any other application submissions you create toward this solicitation.

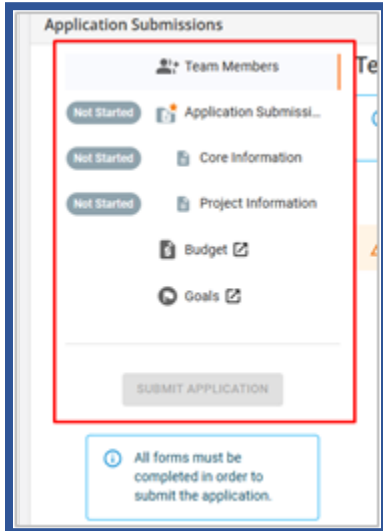


5) Click on the newly added Project Title (labeled with a unique code beginning with “api-”)

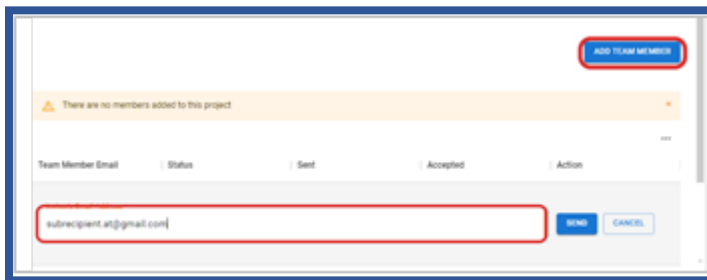


4. Completing and Submitting an Application

Use the following components in the left-hand panel to manage and submit your application:



- 1) **Team Members:** Add team members if you would like to invite other individuals to collaborate on this application.
 - a. Click on the **Add Team Member** button.



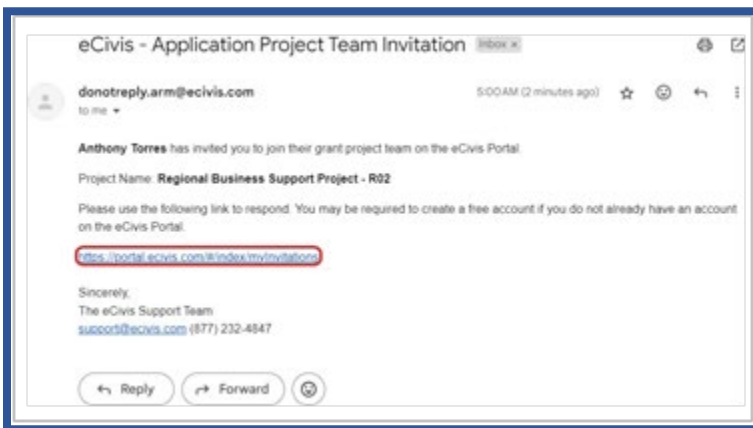
- b. Enter the invitee's email address and click on the **Send** button.
 - c. Project Team Member invitations will be sent and show a status of "Invitation Sent".

NOTE: If the invitation needs to be deleted, you can click on the red envelope icon and if it needs to be re-sent, you can click on the blue invitation icon.

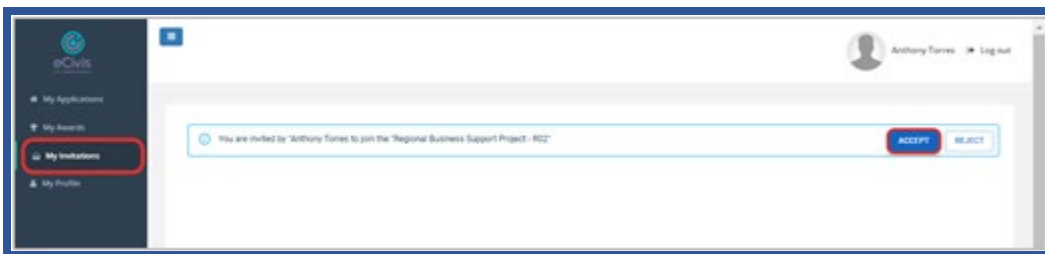


- d. The invitee will receive an email to allowing them to access eCivis *Portal* and accept the invitation.

NOTE: In order to respond and accept the invitation, the invitee must have a *Portal* account or set one up to move forward with acceptance.

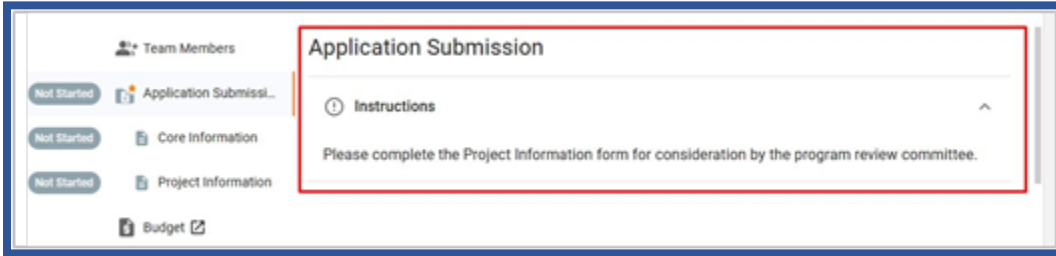


- e. In *Portal*, they will click on **My Invitations** from the navigation bar and then click on the **Accept** or **Reject** button.



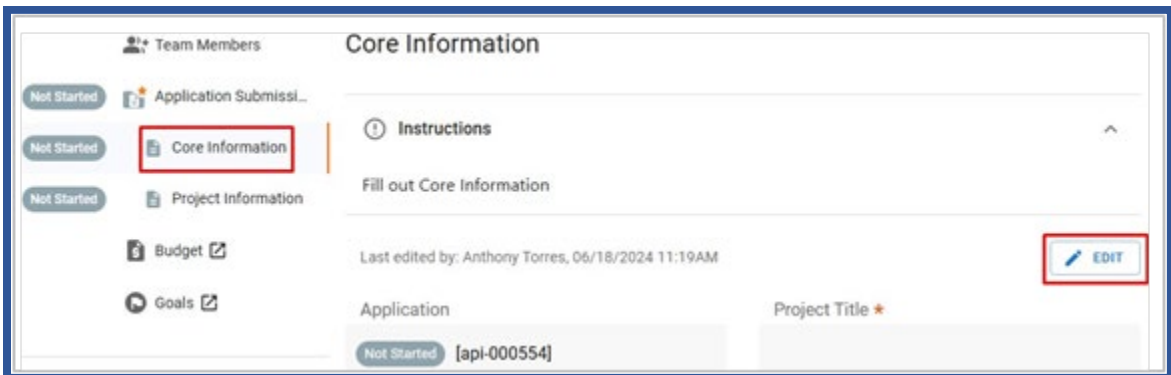
- 2) **Submission Stage:** The starred folder icon  indicates the current Submission Stage to be completed.

- a. Open this section to view the title and instructions for this Submission Stage.

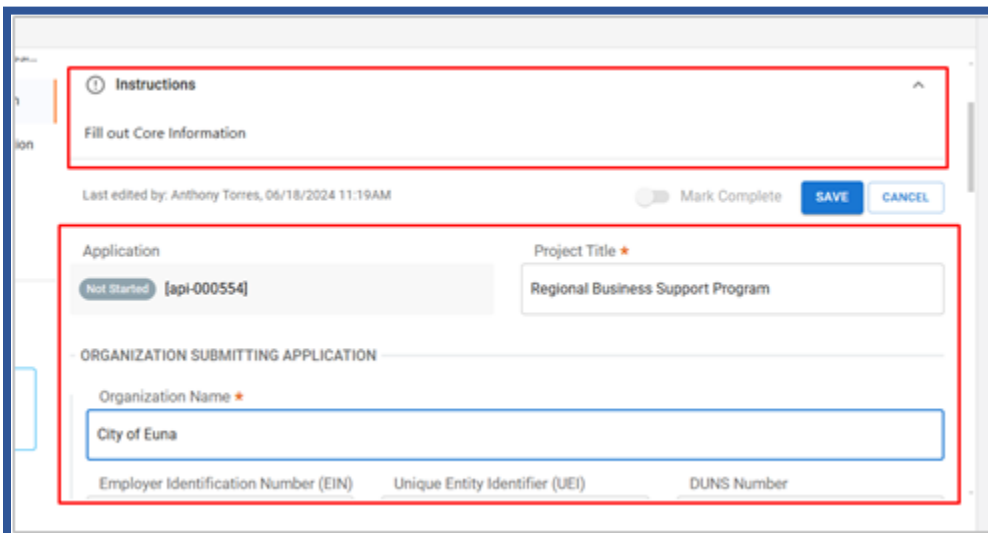


3) **Application Forms:** Open and edit each form until complete.

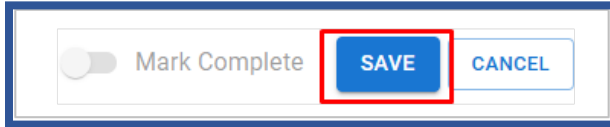
a. Select each form from the left-hand panel and click on the **Edit** button.



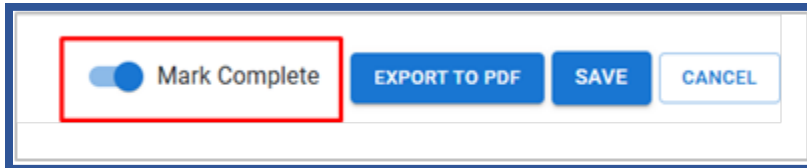
b. Expand the *Instructions* by clicking on the arrow at the top-right corner of that section to review important details provided by the CAL FIRE before continuing to fill the form.



c. Click on the **Save** button to save all form details (either to return to it later or in preparation of marking the form complete).

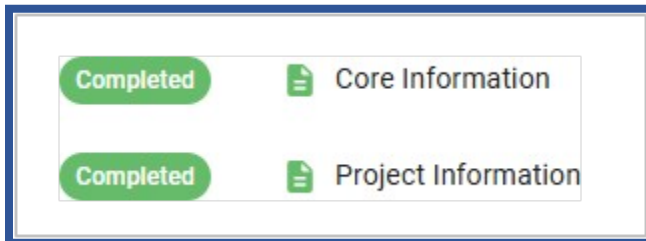


- d. Click on the **Mark Complete** toggle switch when you have finalized all edits. Toggle this switch back to the “off” position if you need to make further edits before submitting your application.

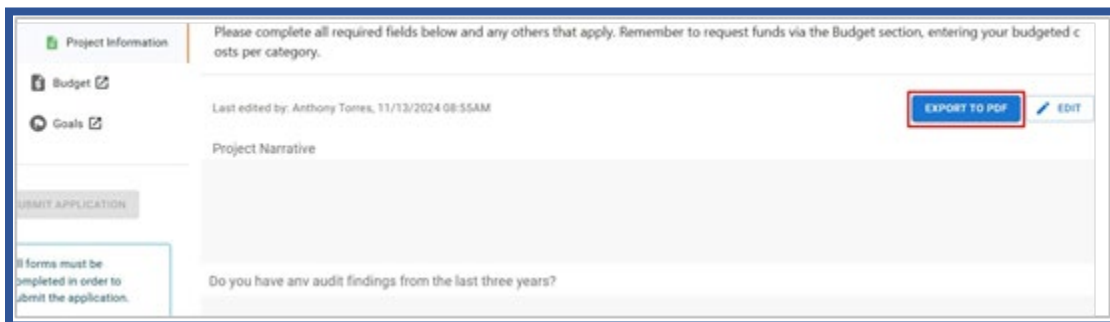


- e. Any forms you mark as complete will update to the green “Completed” status.

NOTE: All included application forms ***must*** be marked complete and, if it is included, the *Budget Worksheet* must have a requested total amount before you can click on the **Submit Application** button. Continue to the next section for those instructions.

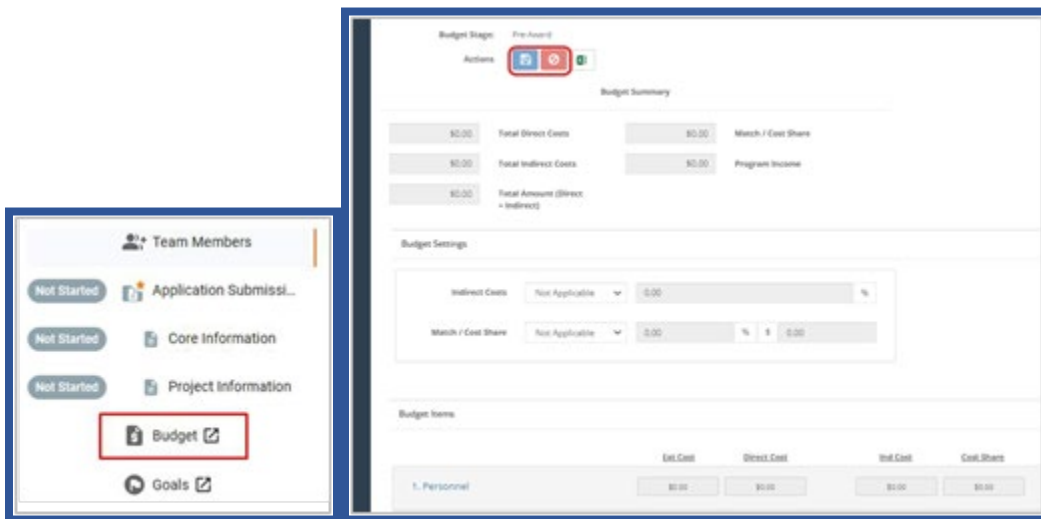


- f. To export a copy of the completed application to PDF format, click on the **Export to PDF** button at the top-right corner of the page.

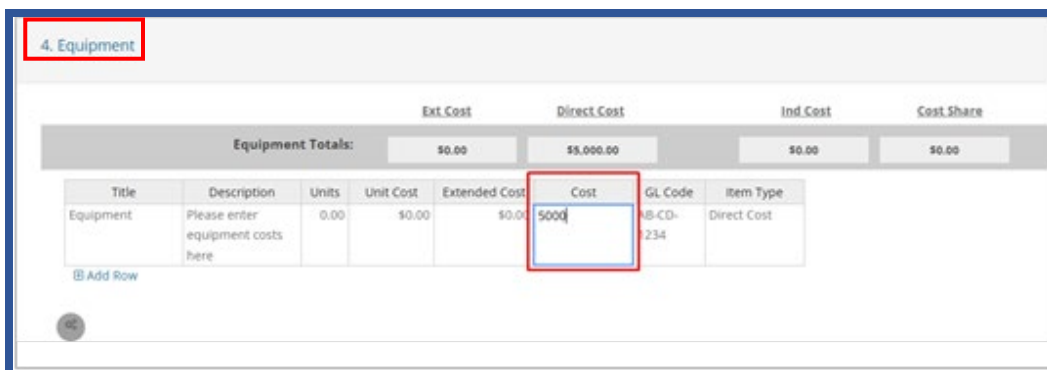


- 4) **Budget:** Fill out the *Budget Worksheet* to propose an award amount and to itemize budgeted costs as needed. If awarded, this same format will be incorporated into your award acceptance, financial reporting, and reimbursement requests.

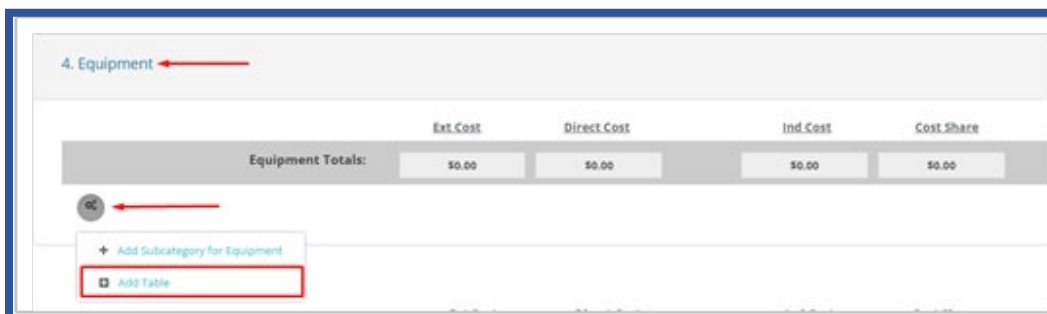
- a. Click on the **Budget** link on the left-hand navigation bar. The *Budget Worksheet* will open in a separate browser tab.



- b. In the worksheet, click on any applicable budget category (hyperlinked in blue) to enter costs. For *Budget Worksheets* with pre-configured tables and line items, simply enter the costs into the “Cost” column.



Alternatively, for *Budget Worksheets* with no prescribed line items, click on the gear icon and select “Add Table” to enter the title, description, and cost for each line item.



4. Equipment

		Ext. Cost	Direct Cost	Ind. Cost	Cost Share		
Equipment Totals:		\$0.00	\$7,580.00	\$0.00	\$0.00		
Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Item Type
Protective Gear	This will include the purchase of a	0.00	\$0.00	\$0.00	\$7,580.00		Direct Cost

+ Add Row

NOTE: When needed, use the “Units” and “Unit Cost” fields to multiply those values into the “Extended Cost” field, which will copy into the “Cost” field. ***Remember*** to clear all four of these fields ***if*** you need to re-enter the calculation.

- c. To add a row, click on the **+Add Row** button below that table. To remove or insert rows above/below, right-click anywhere on the desired row and select an option.

Title	Description	Units	Unit Cost	Extended
Protective Gear	This will include the purchase of a	0.00	\$0.00	

+ Add Row

- Insert row above
- Insert row below
- Remove row

- d. **Budget Settings:** Expand the Budget Settings towards the top-right of the page to select a different method of calculating Indirect Costs and Match/Cost Share. You will see these amounts separated in the *Budget Summary* section at the top of the worksheet.

Application Budget for Anthony Torres

Program: ATorres 3 - Economic Development FY2024
Project name:

Budget Stage: Pre-Award

Actions: [Icons]

Budget Summary

\$5,000.00	Total Direct Costs	\$0.00	Match / Cost Share
\$0.00	Total Indirect Costs	\$0.00	Program Income
\$5,000.00	Total Amount (Direct + Indirect)		

Budget Settings

Indirect Costs: Not Applicable, 0.00 %

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

- i. **Indirect Costs** – The available settings for entering indirect costs include the following:

The screenshot shows the 'Budget Settings' form. Under 'Indirect Costs', there is a dropdown menu currently set to 'Not Applicable'. A red box highlights the dropdown menu, and another red box highlights the 'De Minimus Rate' option, which is currently selected in the dropdown list.

1. **Not Applicable (default setting)** – You will list all indirect costs as line items **and** update the “Item Type” on those line items to “Indirect Cost”.

Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Item Type
Equipment	Please enter equipment costs here	0.00	\$0.00	\$0.00	\$5,000.00	AB-CD-1234	Direct Cost

The 'Item Type' dropdown menu is highlighted with a red box, showing the following options: Direct Cost, Cost Share, and Indirect Cost.

2. **Itemized** – You will include an indirect cost value next to the Cost of any line item.

		Ext Cost	Direct Cost	Ind Cost	Cost Share
Personnel Totals:		\$5,000.00	\$7,500.00	\$750.00	\$0.00

Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Indirect Cost	Cost Share
FTEs	Full Time Employees	1	\$5,000.00	\$5,000.00	\$5,000.00		\$500.00	\$0.00
PTEs	Part Time Employees	0	\$0.00	\$0.00	\$2,500.00		\$250.00	\$0.00

The 'Indirect Cost' and 'Cost Share' columns in the detailed table are highlighted with a red box.

3. **De Minimus Rate** – This will automatically calculate the federal De Minimus indirect cost rate against each budget line where you select the Indirect Cost checkbox.

Cost	GL Code	Indirect Cost	Item Type
\$78,000.00		<input checked="" type="checkbox"/>	Direct Cost

The 'Indirect Cost' checkbox is highlighted with a red box and is checked.

4. **Negotiated Rate** – This will calculate the manually-entered indirect cost rate against each budget line where you select the “Indirect Cost” checkbox.

Indirect Costs: Negotiated Rate (selected) | 17.00 %

Direct Cost		Ind Cost	Cost Share
\$78,000.00		\$13,260.00	\$0.00

Cost	GL Code	Indirect Cost	Item Type
\$78,000.00		<input checked="" type="checkbox"/>	Direct Cost

NOTE: Some *Budget Worksheets* may include a separate budget category dedicated to tracking Indirect Costs. Changing the rows' item types within this category to “Indirect Cost” will allow you to separate Direct Cost and Indirect Cost Totals at the top of the *Budget Worksheet*.

10. Indirect Cost

Indirect Cost Totals:					Ext Cost	Direct Cost
					\$0.00	\$0.00

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

Item Type dropdown: Direct Cost, Direct Cost, Cost Share, **Indirect Cost** (selected)

Budget Stage: Pre-Award

Actions: [Print] [Refresh] [Save]

Amount	Description
\$78,000.00	Total Direct Costs
\$11,000.00	Total Indirect Costs
\$89,000.00	Total Amount (Direct + Indirect)

- ii. *Match/Cost Share* – The available settings for entering Match/Cost Share include:

1. **Not Applicable** (*default setting*) – You will list all match costs as line items and update the “Item Type” on those line items to “Cost Share”.

Extended Cost	Cost	GL Code	Item Type
\$0.00	\$78,000.00		Direct Cost

Dropdown menu options: Direct Cost, Cost Share, Indirect Cost

2. **Total Amount** – You will enter a total match/cost share amount at the top of the *Budget Worksheet*.

3. **Itemized** – You will include a match/cost share value next to the Direct Cost of any line item.

Ext. Cost	Direct Cost	Ind. Cost	Cost Share
\$0.00	\$78,000.00	\$0.00	\$34,998.60

Cost	Extended Cost	Cost	GL Code	Cost Share	Item Type
\$0.00	\$0.00	\$78,000.00		\$34,998.60	Direct Cost

4. **Percentage** – This will calculate the manually entered percentage against each budget line where you select the “Cost Share” checkbox.

Indirect Costs: Not Applicable, 0.00 %

Match / Cost Share: Percentage, 20.00 %, \$ 0.00

Direct Cost	Ind Cost	Cost Share
\$78,000.00	\$0.00	\$15,600.00

Cost	Cost	GL Code	Cost Share	Item Type
0.00	\$78,000.00		<input checked="" type="checkbox"/>	Direct Cost

- e. **Budget Narrative** (*optional*): Unless directed to provide this information elsewhere, you may provide a detailed justification for your proposed budget here. This can also be exported to a PDF file for your records.

Budget Narrative

Enter your budget narrative below.

Rich text editor toolbar: H1, H2, H3, B, I, U, list, link, unlink, %

This budget includes

7979 characters remaining

Floppy disk icon highlighted in red box.

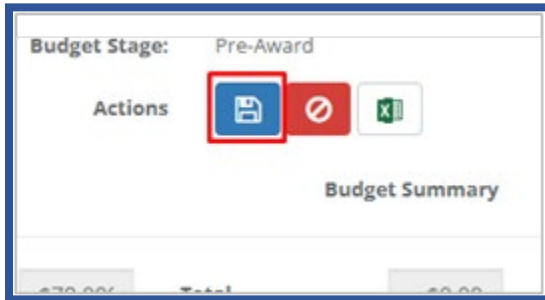
- f. When finished editing the *Budget Worksheet*, click on the **Save Changes** button (at the bottom of the worksheet) or the floppy disk icon (at the top of the worksheet) and input any relevant notes.

Save Changes (highlighted in red box) Discard Changes

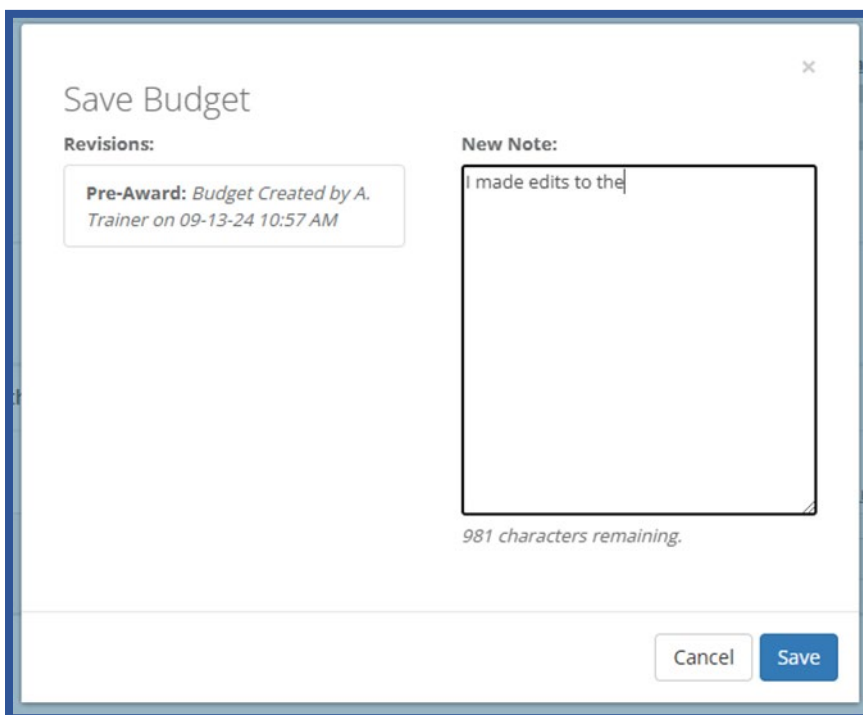
Budget Narrative

Enter your budget narrative below.

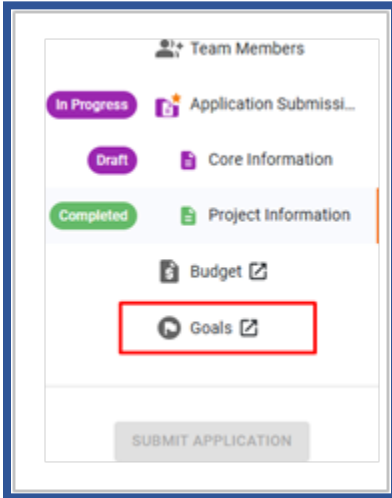
Rich text editor toolbar: H1, H2, H3, B, I, U, list, link, unlink, %



- g. Any notes you add will be timestamped and logged in the “Revisions” history to the left of this pop-up window. This history is visible to both your applicant team members and any CAL FIRE staff reviewing this budget.



- h. When finished editing and saving the *Budget Worksheet*, close the browser tab containing the budget and return to the previous tab containing the application.
- 5) **Goals:** If included in the application, fill out the *Goals Worksheet* to propose project goals. If awarded, this same form will be used later to document the final goal target amounts and to report progress against those goals.
 - a. Click on **Goals** from the left-hand navigation bar. The *Goals Worksheet* will open in a separate browser tab.



b. Enter the target amounts for any applicable goal areas that your project will address.

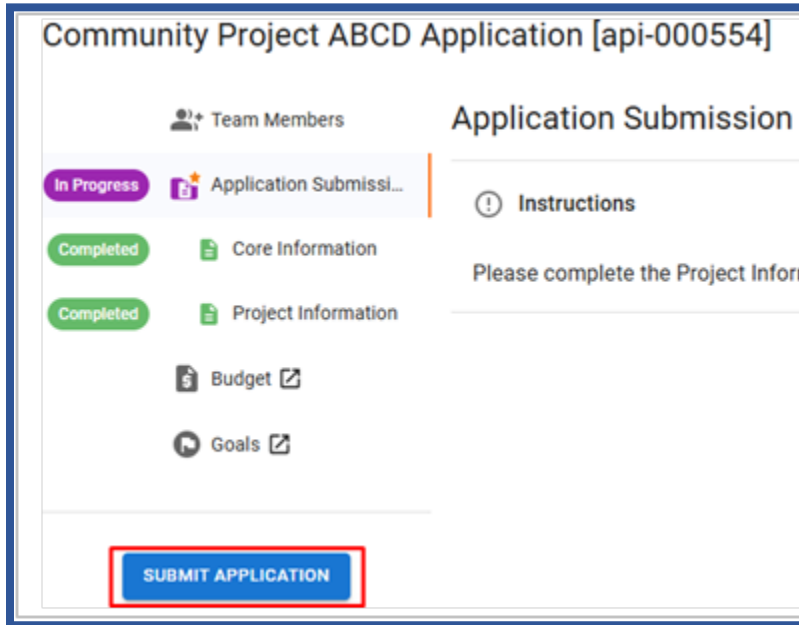
NOTE: The expenditure fields are not used during the application process but may be used when submitting Activity Reports if you are awarded.

Goal / Objective	Target Units	Direct Cost Expenditure	Matching Expenditure	Program Income Expenditure
Provide SBDC Training	0.00	\$ 0.00	\$ 0.00	\$ 0.00
Subgoals				
SBDC Training Session #1	0.00	\$ 0.00	\$ 0.00	\$ 0.00
SBDC Training Session #2	0.00	\$ 0.00	\$ 0.00	\$ 0.00

c. When finished editing, click on the **Save Goals** button.

d. Close the browser tab containing the *Goals Worksheet* and return to the previous tab containing the application.

6) **Submit Application:** Once all forms and required worksheets have been completed, the application can be submitted. Click on **Submit Application** from the left-hand navigation bar.

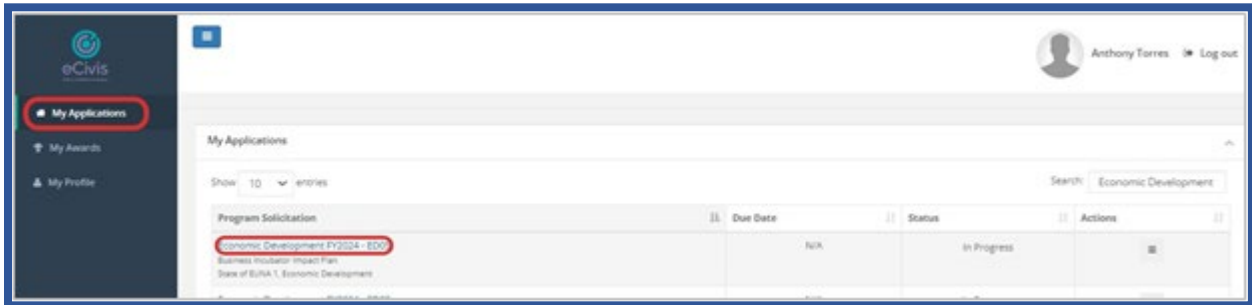


- 7) Once submitted, CAL FIRE will typically allow assigned Review Committee members to access select portions of your application content.

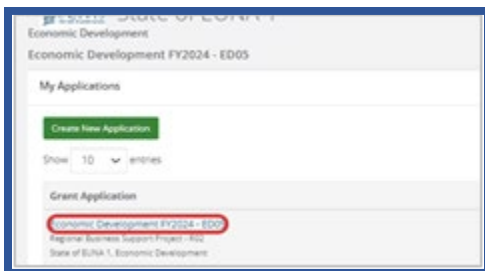
5. Tracking Current & Submitted Applications

To view and monitor your open or previously submitted applications, follow the steps below:

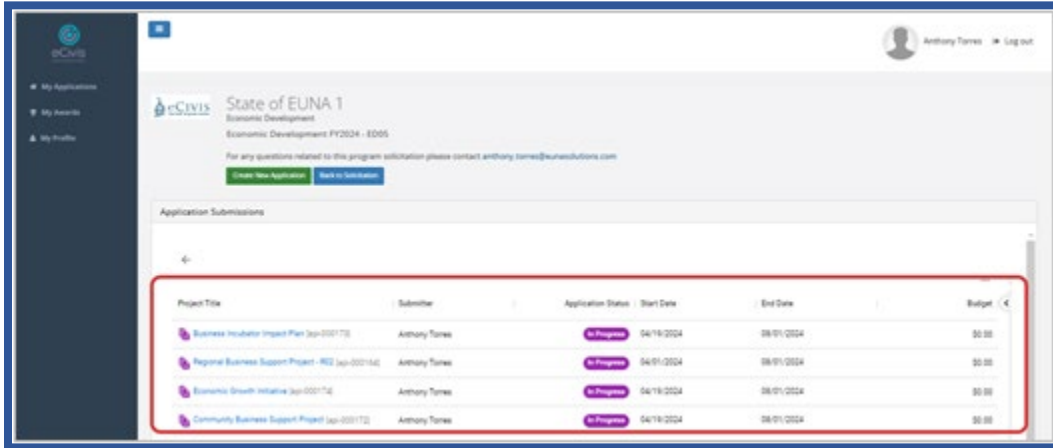
- 1) From your *Portal* dashboard, click on **My Applications** on the left-hand navigation bar. Then, use the top-right search bar or sort the headings of this table to find your application.



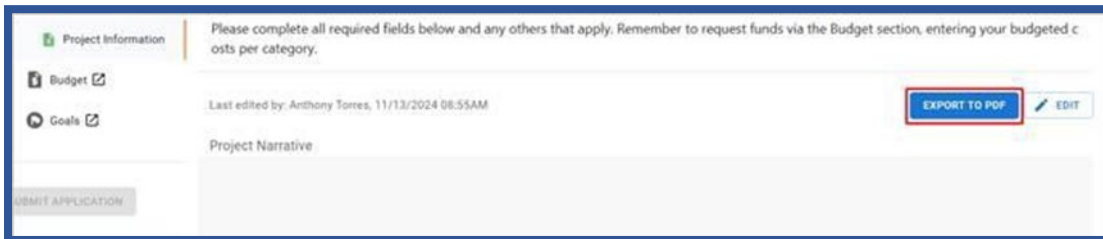
- 2) You will be taken to a table of all applications you have created for this solicitation (ability to submit multiple applications is only available at CAL FIRE's discretion and may be deactivated).
- 3) Click any of the linked application titles in this table to access the *Application Submissions* window.



- 4) The *Applications Submissions* window contains a more detailed table of your applications. Click on the applicable Project Title to review that application.



- 5) To export a copy of the application form to PDF format, open the form name and click on the **Export to PDF** button at the top-right corner of the page.



- 6) To export a copy of the *Budget Worksheet*, open the "Budget" menu item and click on the spreadsheet button at the top of the worksheet.

