

eCivis Grants Portal

CAL FIRE Grantee

User Guide

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Introduction

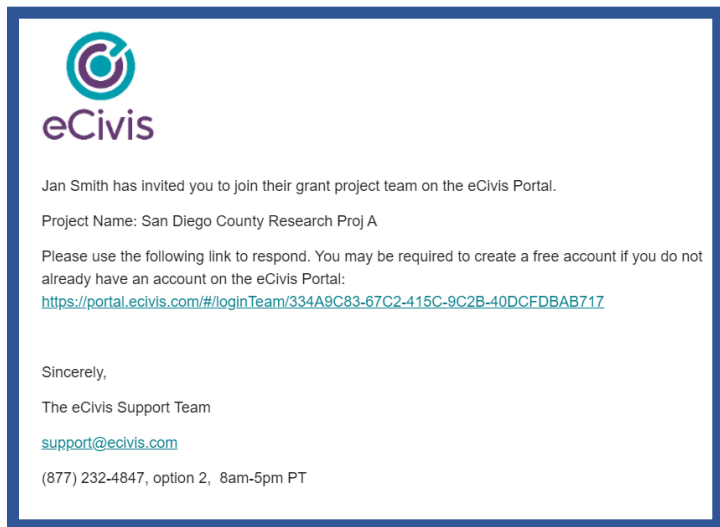
This *eCivis Grants Portal – CAL FIRE Grantee User Guide* is intended to provide a grantee with general guidance on accessing the *Grants Portal* to manage their grant award and complete all required reporting for a CAL FIRE grant program. You will need to refer to the program grant guidelines for specific requirements including details and format of required reporting for your award. Refer to the [eCivis Grants Portal - CAL FIRE Applicant User Guide](#), which is available on the CAL FIRE Grants webpage (<https://fire.ca.gov/grants>) for guidance on how to apply for a CAL FIRE grant program solicitation.

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

- 1) Google Chrome
- 2) Mozilla Firefox
- 3) Microsoft Edge

You may contact CALFIRE.Grants@fire.ca.gov for general questions related to CAL FIRE grant program 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 regarding *Grants Portal* system functionality, reach out to the eCivis support team at support.ecivis@eunasolutions.com.

NOTE: If you are reading this user guide because you received an email similar to the one below and were invited to join a grant project team in the eCivis *Portal* system, proceed to Chapter 1 but you will not perform any of the actions in Chapters 2 or 4.



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).

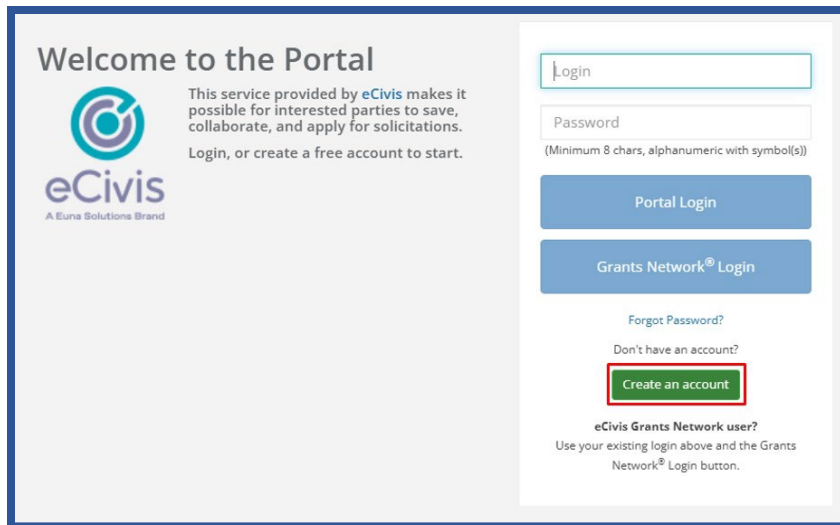
Economic Development Support (FY2023)				
Overview	Eligibility	Financial	Contact	Files
Agency/Department:	Administration			
Contact/Help:	programcontact@countyofeuna.com			
Office:	Office of SB			
Program Contact:	123 Main St Nashville, TN 37211			
Contact Notes:				
Questions should be directed to the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

1. Creating an eCivis Portal Account

When applying for a CAL FIRE grant program solicitation or managing an award using eCivis *Grants Portal*, you will need to either have an existing *Portal* account or create a new one. This is where you will create a user profile, manage your application submissions and, if awarded, manage your post award reporting. 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.



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.

eCivis
A Euna Solutions Brand

Login

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

Portal Login

Grants Network® Login

Forgot Password?

Don't have an account?

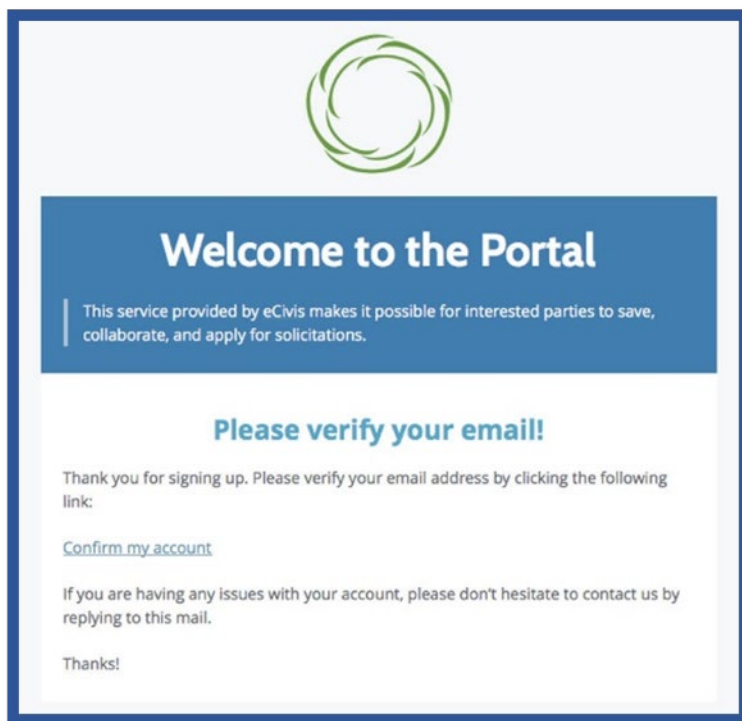
Create an account

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

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

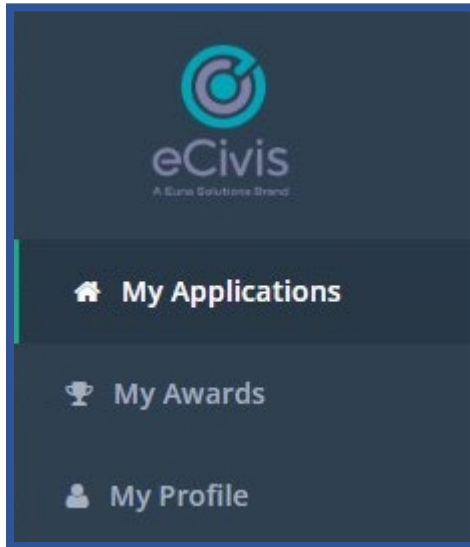
The screenshot shows a 'New Account Signup' form. At the top, it says 'Welcome to the grant application portal.' and 'This free service provided by eCivis allows grant seeking applicants the ability to save, collaborate, and apply to solicitations.' Below this are four input fields: a name field with 'Jane', a last name field with 'Smith', an email field with 'email@eunacity.org', and a password field with dots. There are two blue buttons: 'Perfect' and 'Sign Up'. At the bottom, there is a link that says '← Back to Login'.

- 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.

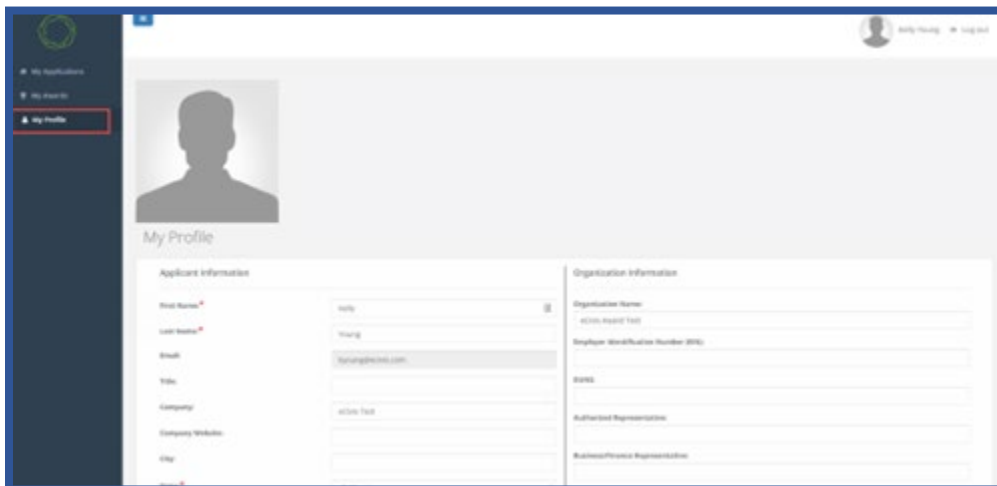
- 4) When you log into *Portal*, you will see a navigation bar on the left of your screen.



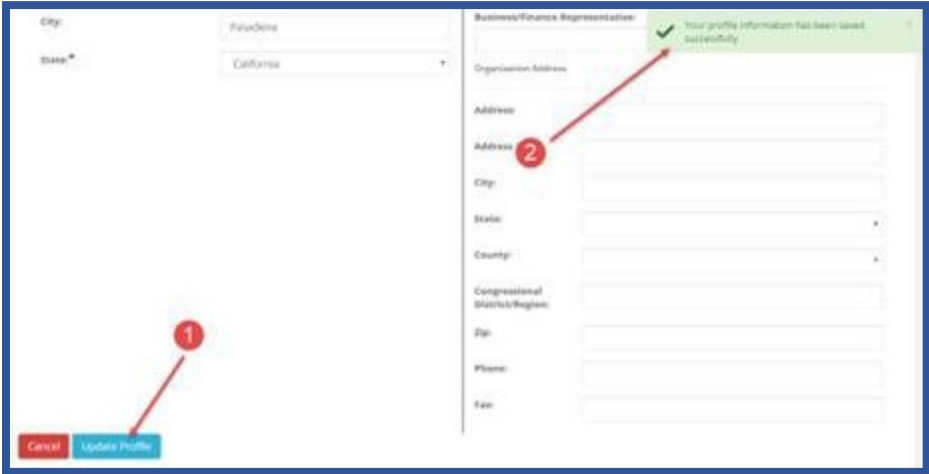
- a. **My Applications:** Gives you access to all applications and program solicitations in your Portal account.
- b. **My Awards:** Gives you access to all the program solicitations where you were awarded.
- c. **My Profile:** Gives you access to your profile information.

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.



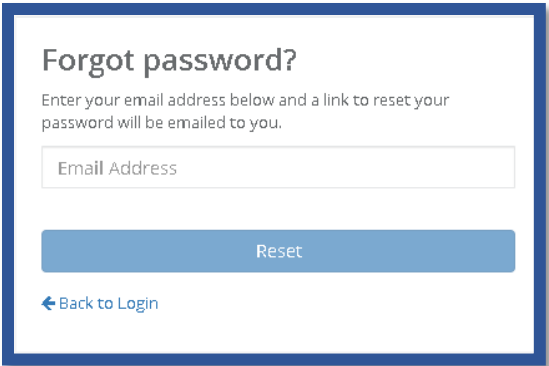
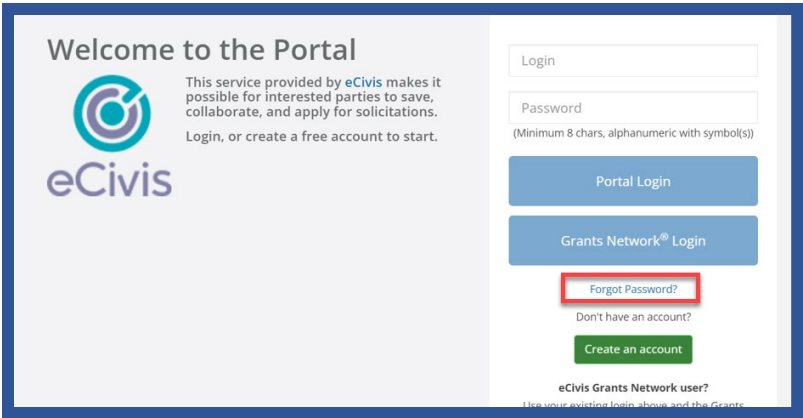
6) If you ever need to edit your profile, you can do so by clicking on **My Profile** on the left-side navigation bar within *Portal*.

NOTE: Information entered on this page will automatically be ported into each new application profile whenever you use 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 program solicitation is covered in the [eCivis Grants Portal - CAL FIRE Applicant User Guide](#).

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.



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

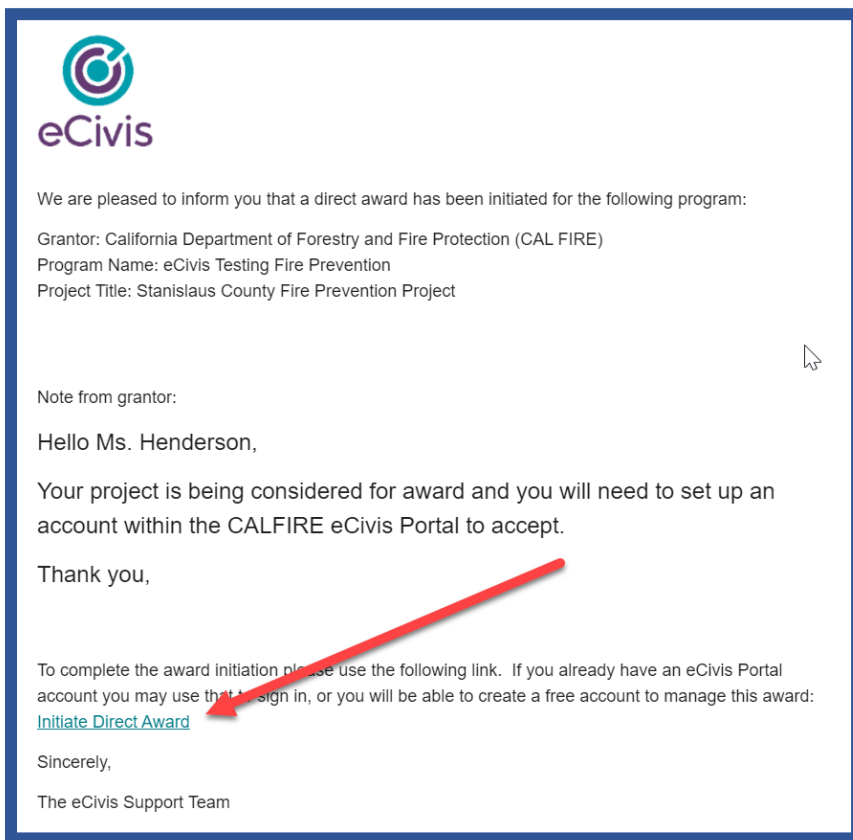
Or

- 2) 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 has already been accepted. Skip ahead 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 either connect your existing *Portal* account or create a new one (if needed) to begin the acceptance process.



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 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.

- 1) If you do not have an existing *Portal* login, refer to Chapter 1 for instructions on creating a new account from the login screen. Otherwise, proceed with entering your username and password.

- 2) 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 (*).

Authorized Representative

Full name: *

Email Address: *

Address: *

Address 2:

City: *

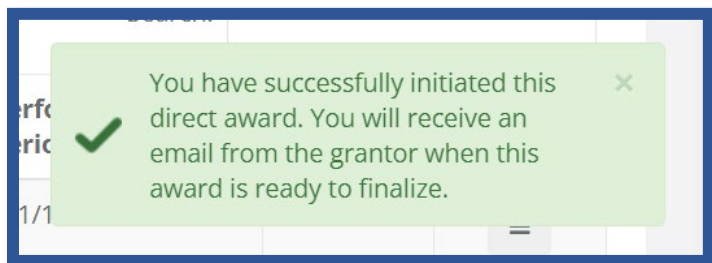
State: *

Zip: *

Phone: *

Phone Ext:

- 3) You will receive a green notification on the next screen to confirm you have successfully initiated the Direct Award process. You will receive a response when your award is approved and you will be given the option to either accept or decline the award.



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.

Award Notification Letter

Dear Ulysses Grant,

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

Project: Stanislaus Co Fire Prevention Project

Program: Fire Prevention FY 2021-2022

Approval Date: 12/01/2022

Approved Amount: \$100,000.00

FY 2021-2022 - Stanislaus Co Fire Prevention Project - \$100,000.00

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

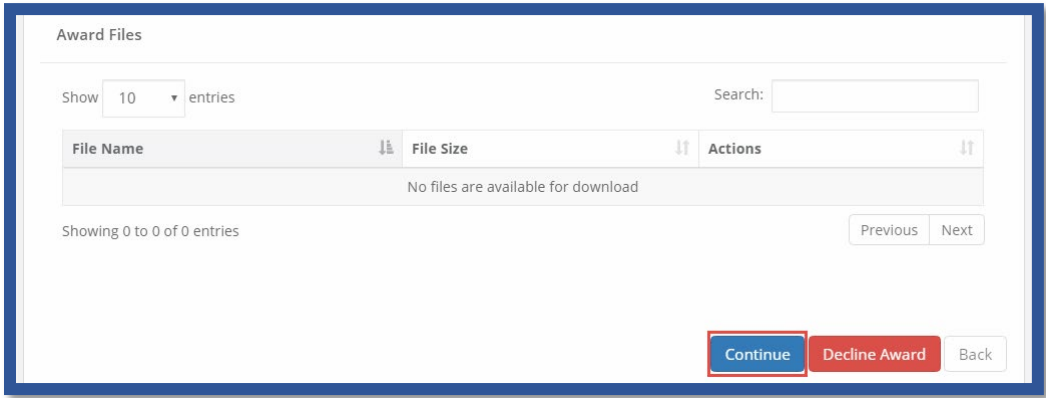
Please find your award notification attached. To see full award details and accept your award, please click [here](#).

- 2) Log into *Portal* and click on **My Awards** from the left-hand navigation bar. Locate the appropriate grant title then, from the *Actions* column, select **Accept/Decline Award**.

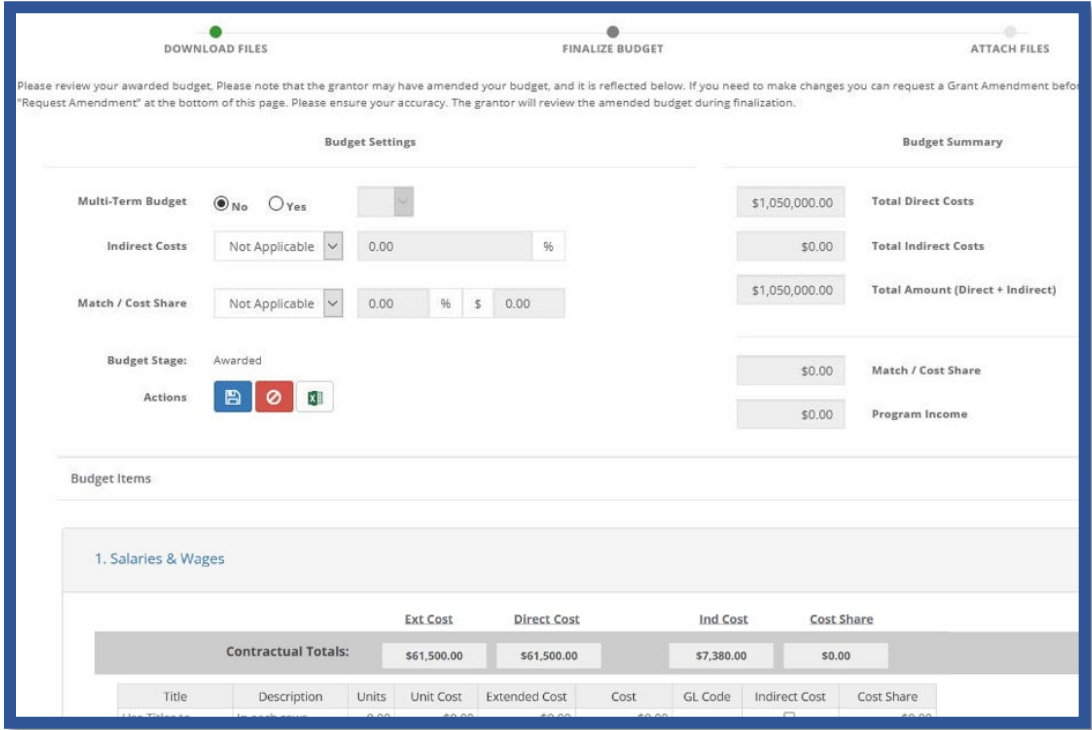
The screenshot shows the 'My Awards' page. The left-hand navigation bar has 'My Awards' selected. The main content area displays a table of awards. The first row is highlighted, and the 'Actions' column for that row shows a dropdown menu with 'Accept/Decline Award' selected.

Grant Title	Project Title	Award Status	Notification Date	Performance Period	Role	Actions
Fire Prevention FY 2021-2022	Stanislaus County Fire Prevention Project	Pending Acceptance	N/A	10/1/21 - 9/30/22	Owner	Accept/Decline Award
Forest Health Program FY 2021-2022	Amador County	Pending Acceptance	N/A	1/1/19 - 1/1/22		

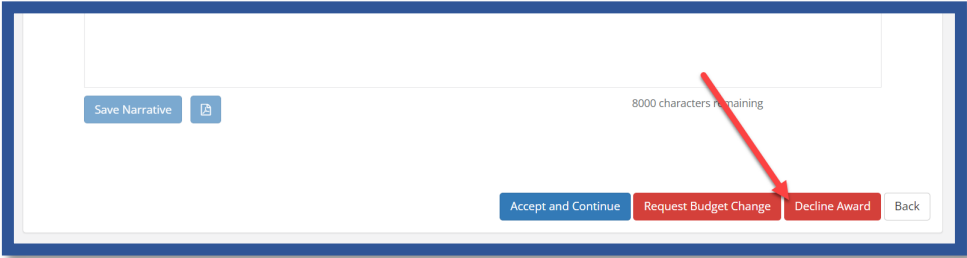
- 3) On the following page, download any files from the *Actions* column. Then, click **Continue**.



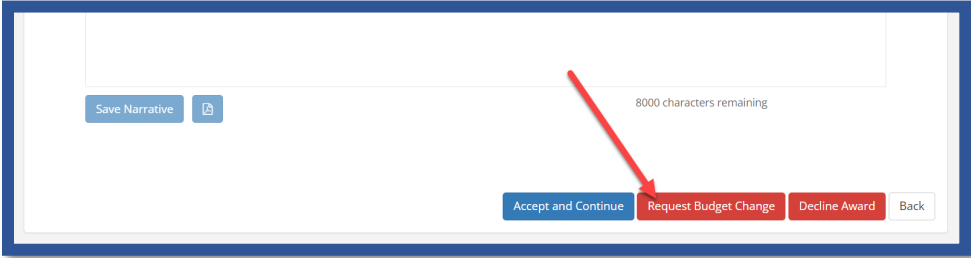
4) Review and finalize your budget. CAL FIRE may not have awarded you the exact amount you requested. You can request changes if you believe the budgeted items are justified, however, you are strongly encouraged to reach out to the applicable CAL FIRE representative for your award prior to requesting the changes to ensure that the changes are acceptable.



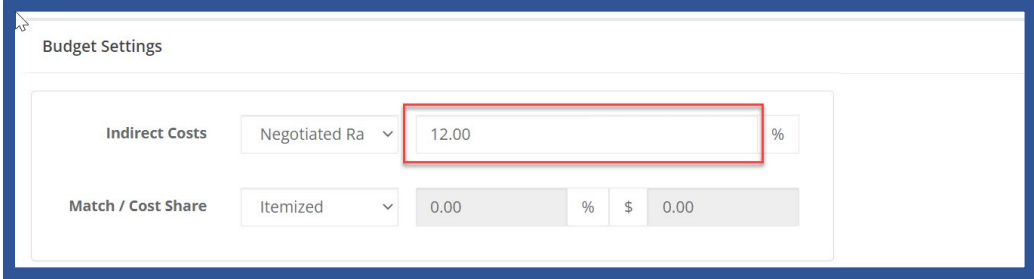
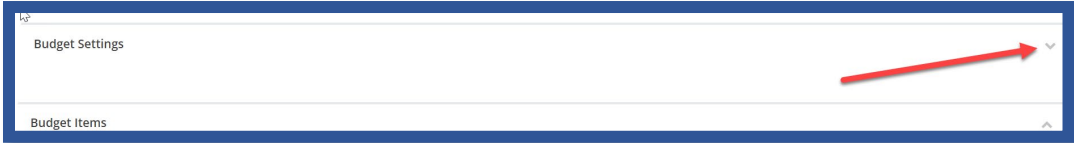
a. If you plan to decline your award offer, click on the **Decline Award** button.



b. If you would like to request a budget change and make edits **before** accepting the award, click on the **Request Budget Change** button. 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 the next steps on editing your budget.

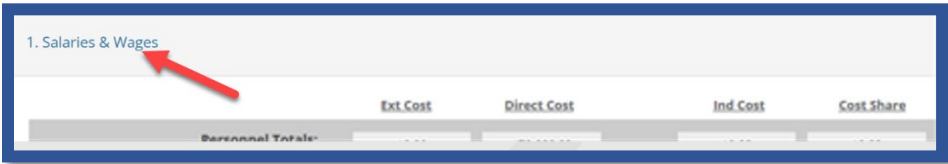


i. First, if Indirect Costs are applicable indicate the Negotiated Indirect Cost rate within the *Budget Settings* section. You can expand the *Budget Settings* section by toggling the drop-down arrow to the right of the screen.

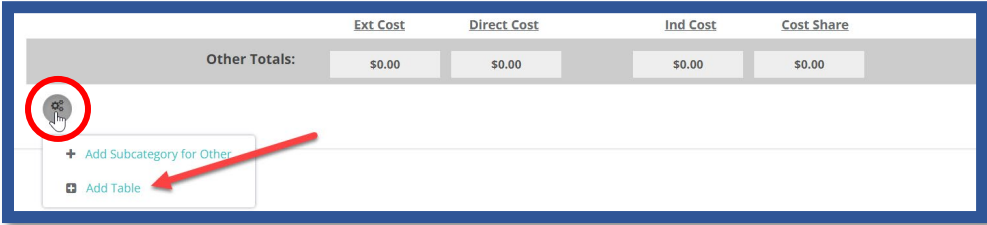


NOTE: Prior to award, CAL FIRE will review your proposed budget and the applicability of indirect costs against eligible direct costs. Approved indirect costs will be included as a separate “Indirect Cost” budget item and will not be calculated as indirect costs within the individual budget items.

- ii. Scroll down to enter or edit costs by category. The totals for *Direct Cost*, *Indirect Cost (Ind Cost)*, the combined total, and the *Cost Share (i.e., match)* will appear in the summary table above as you enter them in.
- iii. Click on one of the budget categories titles (hyperlinked in blue).



- iv. If there is no table below the grey subtotal display boxes, click on the grey gear icon, then select **Add Table**.



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

	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

- vi. Either edit the existing line items or click on **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. You can also skip straight to the *Cost* field if units/unit cost **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

NOTE: The *Indirect Cost* column will leave a checkmark next to each line where you may want to apply the above “Negotiated Rate” for indirect costs. Lastly, you will enter matching costs in the *Cost Share* column.

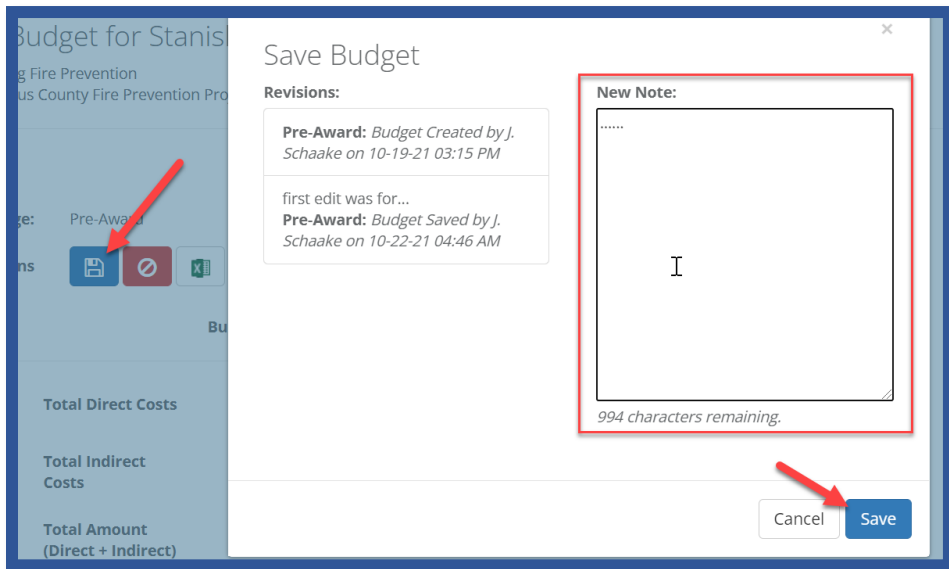
- vii. For **Forest Research grants only** – You will notice two additional columns in your budget tables showing Phase 1 and Phase 2 amounts for each cost line. The *Phase 1* column is what your budget uses to calculate the *Cost* column for that line and the *Phase 2* column is for **display purposes 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
\$0.00	\$50,000.00	\$60,000.00	\$50,000.00

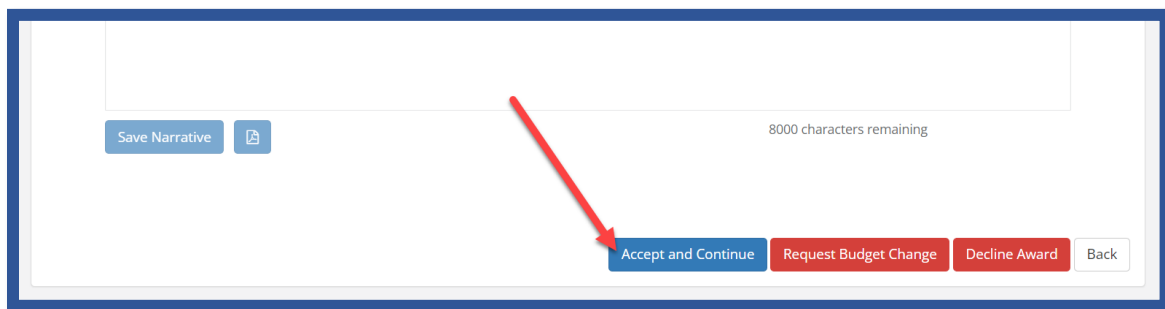
If your project should be awarded for Phase 2 funding, you will receive a new award (typically in the next fiscal cycle) that contains those Phase 2 amounts now in the *Phase 1* column.

Cost	Phase 1	Phase 2	Cost	GL Code
\$0.00	\$60,000.00		\$60,000.00	

- c. You can include comments in the *Budget Narrative* section to further explain and justify your changes. Please refer to the grant 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 it in the *Budget Narrative* field.
- d. When finished with your edits, click on the **Save** button and leave any applicable notes about the edits made. A history of your revision notes will appear to the left.



- 5) Once you are finished reviewing or editing the budget, click on the **Accept and Continue** button 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: Should you make *any* edits, be prepared to click on the **Return to Grantor** button (*not* “Decline”) on the last page to request approval of your changes.

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"/>

7) Click on the **Save and Continue** button.

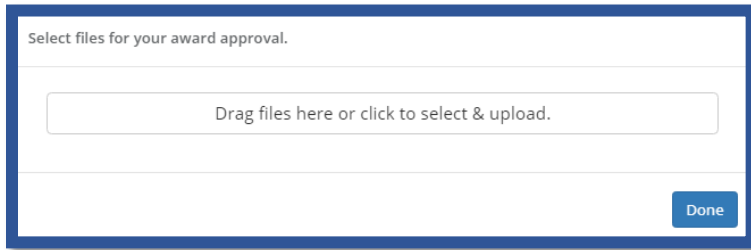
b) Acres of Fuels Reduction:	<input type="text" value="0.00"/>	\$ <input type="text" value="30,000.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>
b01) Chipping:	<input type="text" value="0.00"/>	\$ <input type="text" value="10,000.00"/>	\$ <input type="text" value="0.00"/>	\$ <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"/>

8) On the final screen, you will accept or return the award. If you need to attach files to accept the award, click on the **Upload File** button (refer to the grant guidelines for your grant program to check for any required documentation and appropriate file formats).

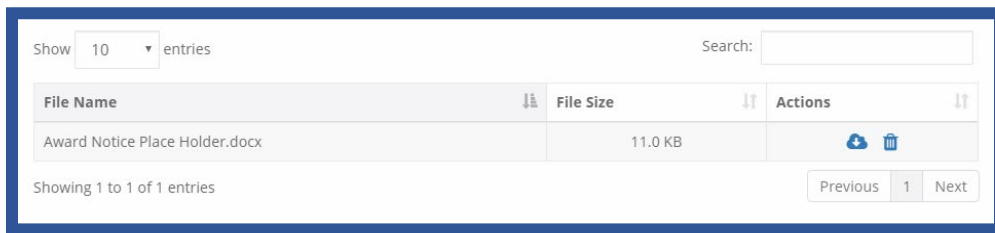
Please upload any files necessary to finalize your award approval. This may include signed agreements, tax forms, and other files provided by the grantor.

Award Files

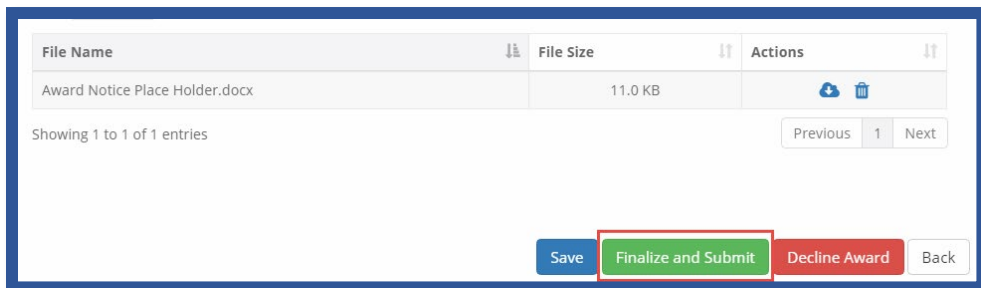
Files can be attached by selecting them from your File Explorer or by dragging and dropping files from your File Explorer to the browser.



Any uploaded file can be downloaded again or deleted using the icons under the *Actions* column.

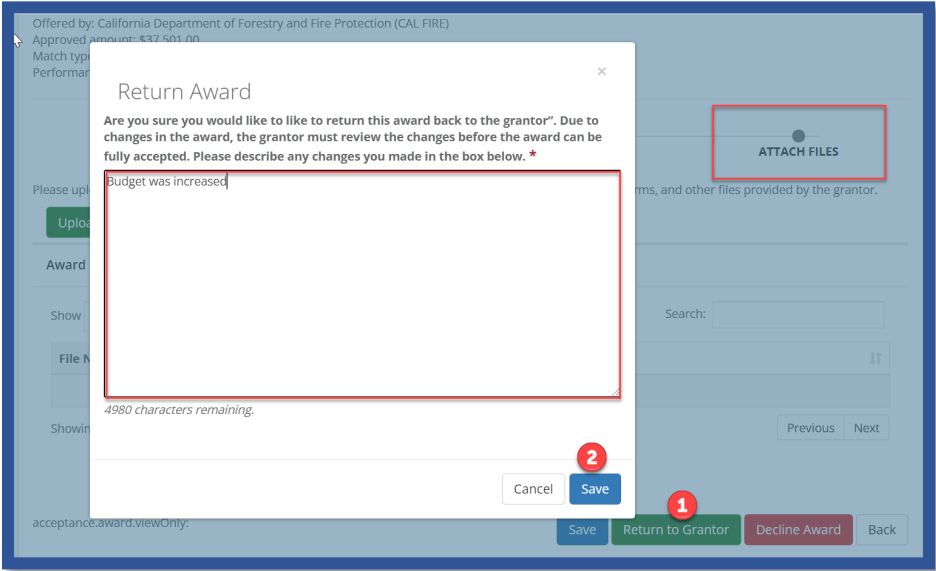


- 9) Click on the **Finalize and Submit** button to send the Program Administrator a notification that you have accepted the award. You can also leave an optional note for them.

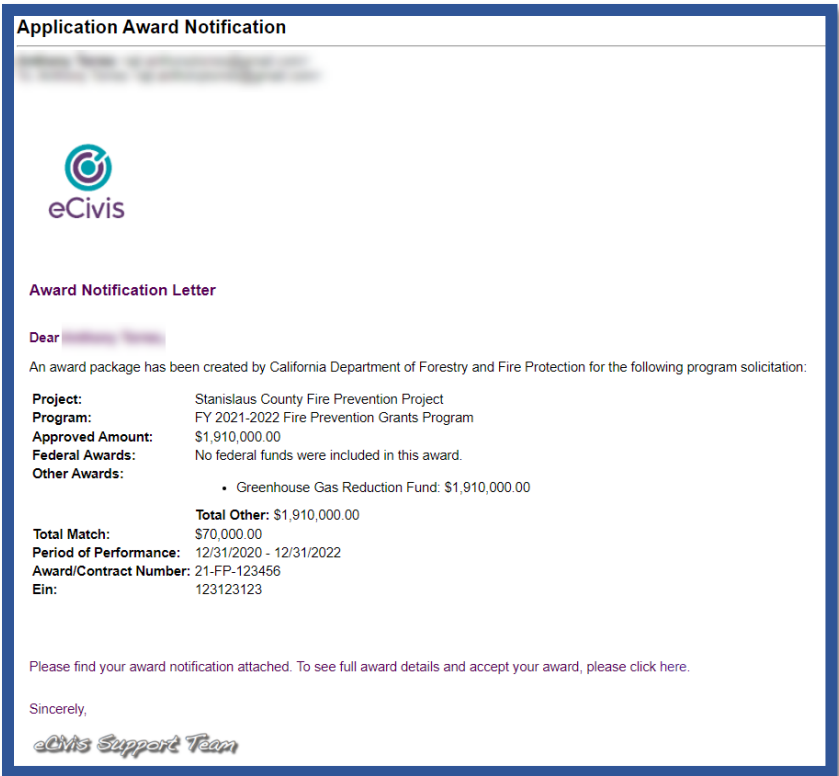


Or

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



10) 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. However, if you requested changes, you would need to go through the above steps starting with Section 2.2 once more (to review for accuracy) and accept the award to proceed to the Final Award Approval process. Otherwise, you will receive an email notification that your award is finalized, and you will find the award details within your *Portal* account.



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

Access to all your awards and their financial history is available within the *My Awards* section using your *Portal* navigation bar.

The screenshot shows the 'My Awards' section of the eCivis Grants Portal. At the top right, there is a user profile for Kelly Young with a 'Log out' link. Below the header, there is a search bar and a 'Show: 10 entries' dropdown. The main content is a table with the following columns: Grant Title, Award Status, Notification Date, Performance Period, Role, and Actions. The table contains seven rows of grant data. At the bottom of the table, there is a 'Showing 1 to 7 of 7 entries' indicator and pagination controls for 'Previous', '1', and 'Next'. A 'Reload' button is located at the bottom right of the table area.

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

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

- 6) **Actions** (options will vary according to award status):
 - a. Manage Award (if Award Status shows as “Awarded”)
 - b. Accept/Decline Award (if Award Status shows as “Pending Acceptance”)

You can select “Manage Award” from the *Actions* column for each awarded grant 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*.

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

View Budget View Goals View Files Submit Financial Report Submit Activity Report Request Grant Amendment Award Closeout Manage Project Team

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

- 1) Review the summary of the award and click on the blue + button 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:** View any files that CAL FIRE has attached 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 new grant amendment
- 8) **Award Closeout:** Begin your closeout financial report that will allow you to close out your award.
- 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	

Showing 1 to 1 of 1 entries (filtered from 12 total entries)

- 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

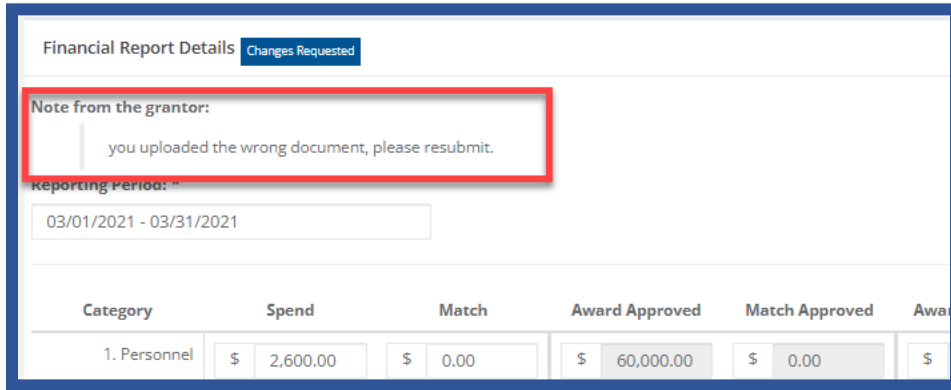
3.3. Award Activities Section

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:**
 - a. Draft: The report has been created but not yet submitted to CAL FIRE for review.
 - b. Pending Approval: The report has been submitted to CAL FIRE and is being reviewed.
 - c. 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).
 - d. Approved/Awaiting Payment: CAL FIRE has approved the report but has not yet processed payment.
 - e. Approved/Paid: CAL FIRE has approved the report and the payment has been issued to the grantee.
 - f. Changes Requested: Revision to the report and resubmittal is required.
 - g. Rejected: The report has been rejected and cannot be re-submitted. If you click on **View Report** from the *Actions* column, you may view any notes provided by CAL FIRE on the report to explain the reason for the rejection (if provided).
- 6) **Actions:**

- a. Edit Report: For reports in draft status, this option opens the report to continue working on it and eventually submit for review/approval.
- b. Review/Resubmit: If a report has changes requested by CAL FIRE, the grantee will have the opportunity to edit the returned report and resubmit it. The report will contain a note 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

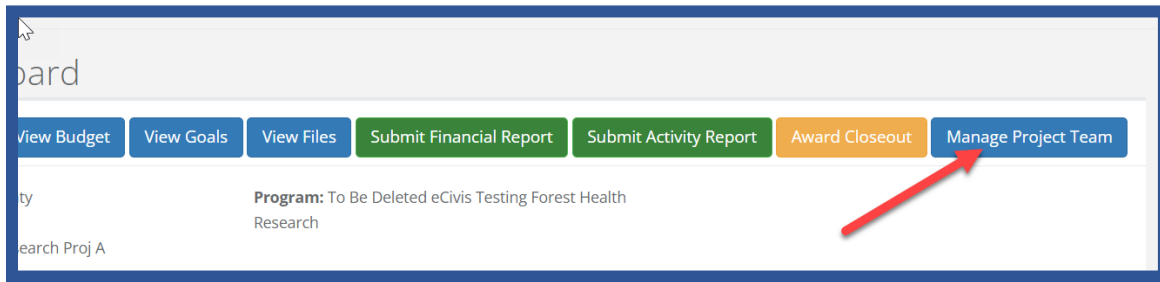
Category	Spend	Match	Award Approved	Match Approved	Awa
1. Personnel	\$ 2,600.00	\$ 0.00	\$ 60,000.00	\$ 0.00	\$

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

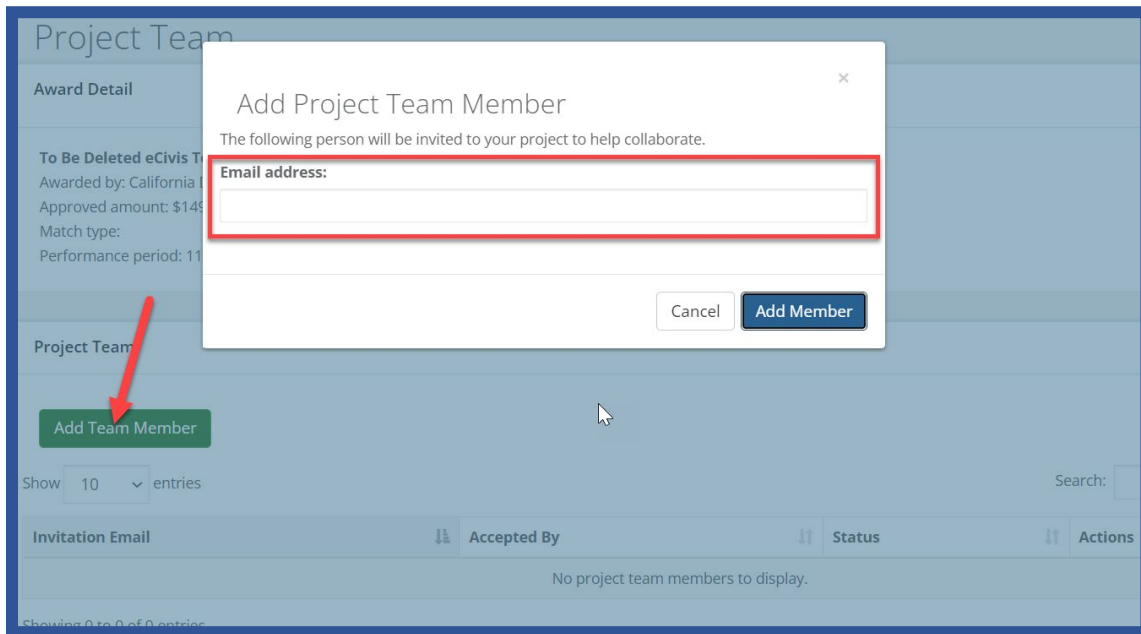
4. How do I add/remove team members for my award?

If you are the Owner of the grant award, you may add team members to help with managing the award and completing required tasks, as well as delete team members no longer assisting with the award. 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.

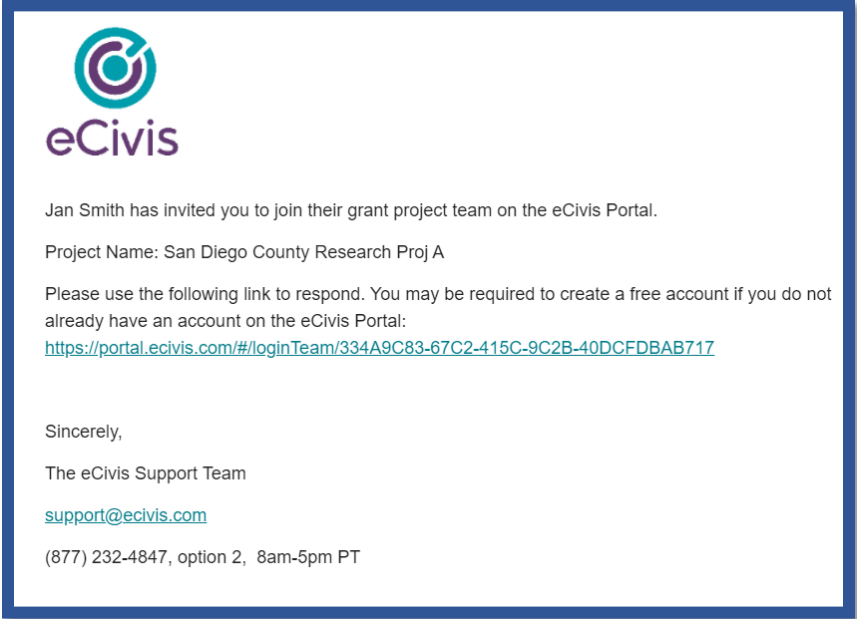
- 1) Click on the **Manage Project Team** button from the *Award Dashboard*.



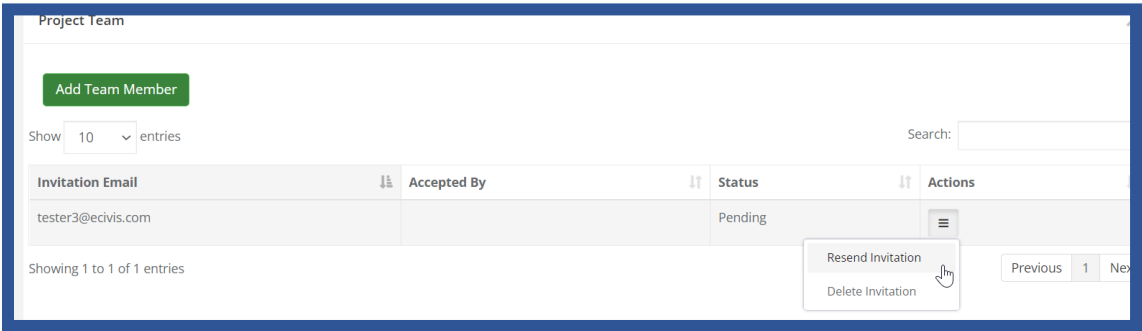
- 2) Click on the **Add Team Member** button and enter the recipient's email address in the pop-up window. Finish by clicking on the **Add Member** button.



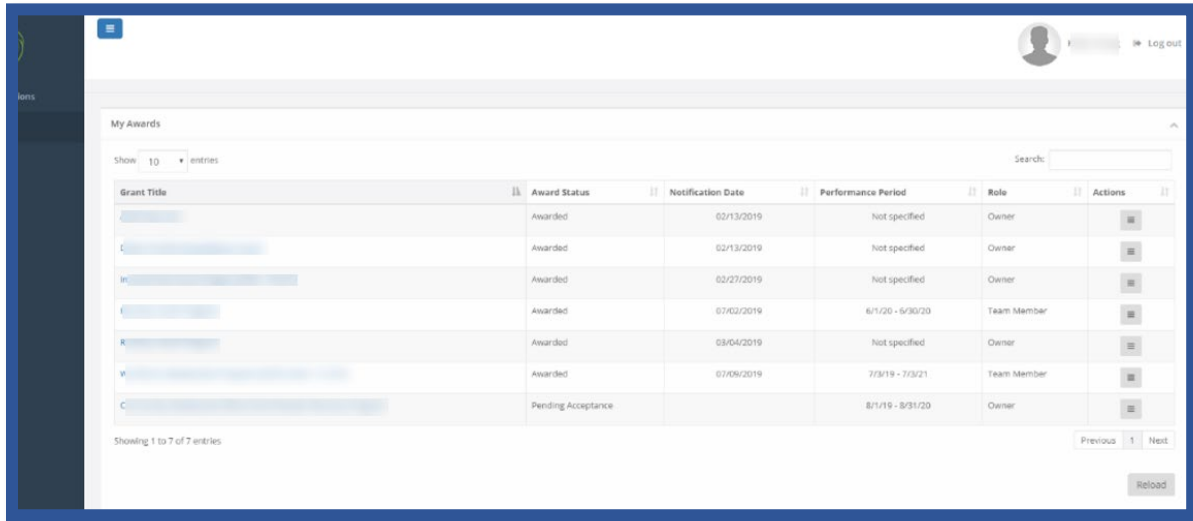
- 3) The recipient will receive instructions to join this specific project team and to either log into their existing *Grants Portal* account or set up a new one (if they do not already have one).



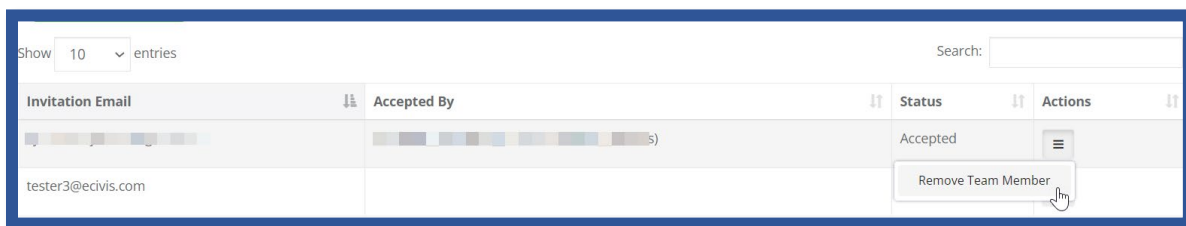
4) You can click on **Resend Invitation** from the *Actions* column to resend or delete this invitation.



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



6) You also have the ability to remove users from the *Actions* column.

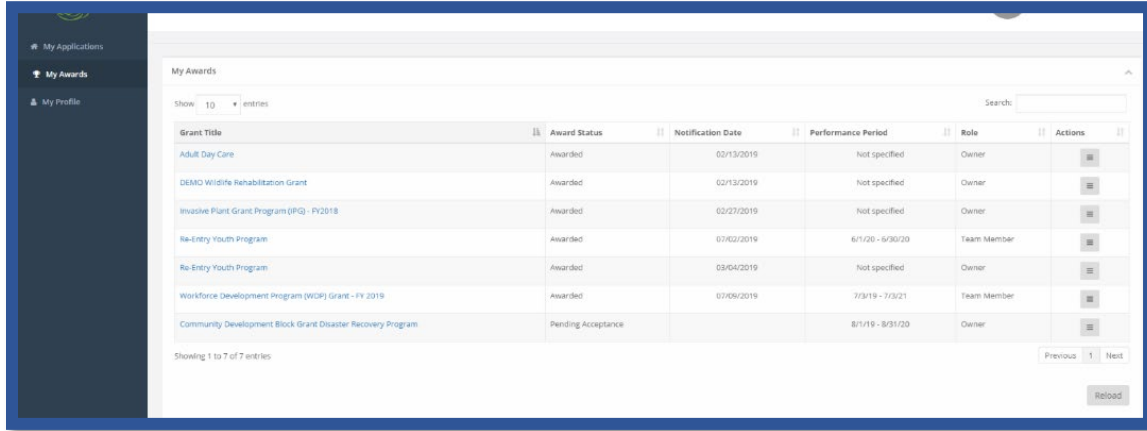


NOTE: If an invitation is sent to a specific team member but they would prefer to access the award using a different email address, they can do so by doing **one** of the following:

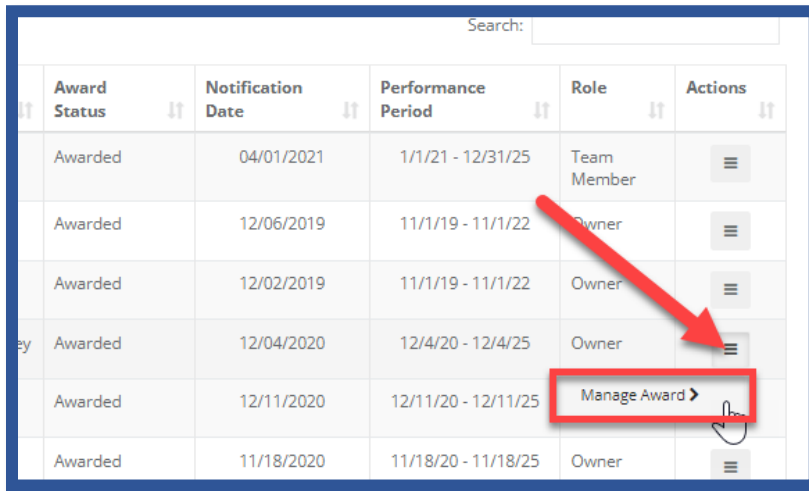
- 1) Log in using an existing *Portal* account that uses a different email address
- 2) Create a **new Portal** account using the different email address **after** clicking on the link in the invitation email they received. If your team member is not receiving the invitation email (nor is it in their junk/spam folder) after they have been invited, please contact [eCivis Customer Support](#) for assistance.

5. How do I submit deliverables to CAL FIRE?

- 1) Click on **My Awards** from the navigation bar on the left side of your *Portal* account.



- 2) Locate your award and select **Manage Award** from the *Actions* column.

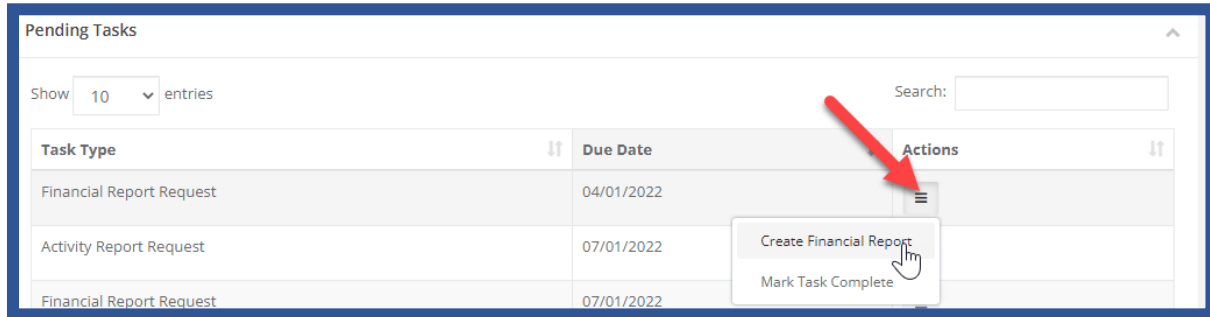


5.1. Submitting Financial Reports

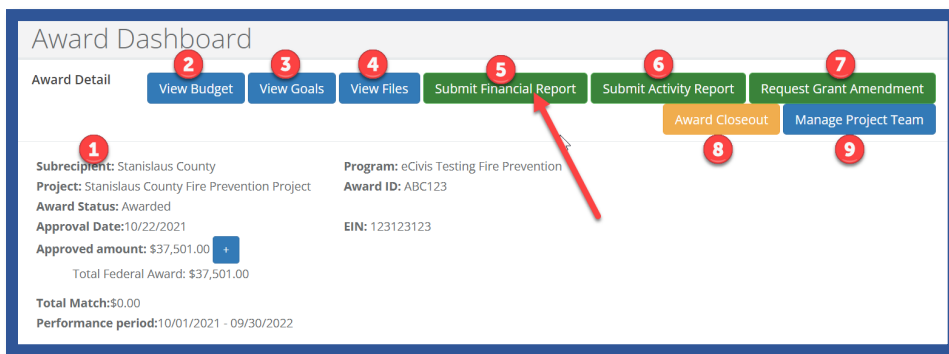
From the *Award Dashboard*, you can submit a Financial Report directly to CAL FIRE whether you have a report due or need to initiate a new (unscheduled) report. The Financial Report should **only** be used to invoice for actual costs or liquidation of advance funds.

NOTE: 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 grant program requires submittal of a progress report with each invoice, please refer to Chapter 5.2 – *Submitting Activity Reports* for guidance.

- 1) Within the *Pending Tasks* section of the *Award Dashboard*, locate the Financial Report Request that is due, then select **Create Financial Report** from the *Actions* column.



- a. If you need to initiate a report *outside* of the existing tasks listed, click on the **Submit Financial Report** button.



- b. Select **Continue with New Report**.

- 2) Continue on for the next steps on filling out and submitting the report.

5.1.1. Understanding the Award Detail and Financial Overview

- 1) **Award Detail:** This provides a summary of the award information, including match details and project performance period.

Award Detail [Back to Award Detail](#)

Forest Health Program FY 2018-2019 Awarded

Awarded by: California Department of Forestry and Fire Protection (CAL FIRE)
 Approved amount: \$3,933,466.41
 Match type: Cash
 Cash match: \$1,166,331.00
 Performance period: 07/19/2019 -03/31/2023

2) **Award Financial Overview:** This 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 \$ 1,589.38	Expended \$ 1,589.38	

This section is **not** editable but will update itself depending on the amounts that are submitted in the Financial Report Details. It shows a summary of the total award spent and the total award amount remaining.

a. Payments Received to Date:

- i. **Advance/Allocation:** Represents the cumulative amounts advanced to the grantee for the **entire** grant award. This amount **will not** reduce when advance funds are liquidated.
- ii. **Reimbursement:** Represents the amount invoiced and reimbursed to the grantee. This amount **does not** reflect any liquidated advance funds.
- iii. **Total Disbursed:** Total funds provided to the grantee for the grant award.

iv. *Pending Disbursement*: Funds requested for reimbursement by the grantee but not yet paid by CAL FIRE.

b. Award Total Spend to Date:

- i. *Spend (\$/%)*: Amount and percentage of grant funds spent by grantee, **including** liquidation of advance funds, on the award
- ii. *Match (\$/%)*: Amount and percentage of match funds reported by the grantee towards the project
- iii. *Spend (\$)*: Amount of grant funds **and** match that the grantee has spent towards the project

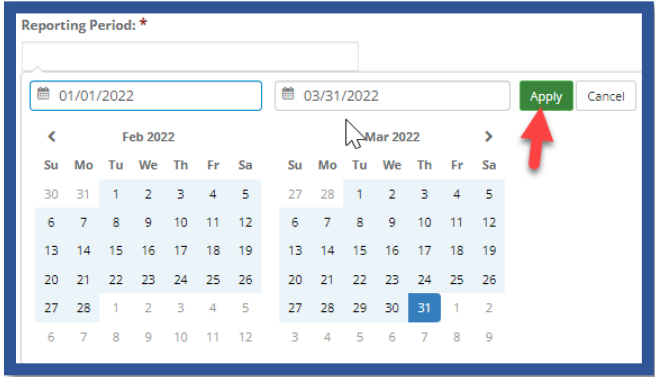
NOTE: The amount of advance funds remaining to be liquidated will be the difference between *Payments Received to Date (Total Disbursed)* **less** *Award Total Spend to Date (Spend)*.

- c. Advance Payments: Amount of Advance Funds provided by CAL FIRE on the award
- d. Award Remaining to Date: Remaining balance of grant funds and match.
- e. Award Total Program Income: This 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. Also note that Program Income operates **independently** of the other fields; balances here do not affect other amounts.

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* section, click inside of the Reporting Period text box, provide the dates of the reporting period, then click on the **Apply** button.



2) CAL FIRE requires “Detailed Financial Reports” which means that you are required 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 those costs. You will need to submit and be approved for a grant amendment prior to being able to report on those categories (refer to Chapter 6 – *How Do I Request a Grant Amendment?* for guidance).

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	\$ 0.00	\$ 0.00	Description				
2. Employee Benefits	\$ 0.00	\$ 0.00	\$ 60,000.00	\$ 0.00	\$ 60,000.00	\$ 0.00	\$ 60,000.00
GL Code / Activity	\$ 0.00	\$ 0.00	Description				
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	\$ 0.00	\$ 0.00	Description				
6. Equipment	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

3) For every budget category in which you are submitting financial reports (aka 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*.

- 4) You will enter an GL (General Ledger) Code and/or Activity title along with its amount and description for each applicable expenditure in that spending category. Click on the + button 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 (e.g., 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 the description of the invoice document according to spending category.
 - i. For Salaries & Wages, enter “Personnel – [Employee name (if available) - expense period]”
 - ii. For Benefits, enter “Benefits – [Employee name (if available) - expense period]”
 - iii. For Contractual, enter “[Vendor name] – [Invoice #]”
 - iv. For Travel & Per Diem, 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 Costs, 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 not** be able to complete a financial report if your grant expenditures exceed 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 – *How Do I Request a Grant Amendment?* 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 that category
 - iv. **Description:** Enter a brief description

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

- 5) 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 identify spend and match on the applicable columns.

- 6) 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 cost 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.”

7) 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 Description				
Example Item B	\$ 11,300.00	\$ 0.00	Example Description				
Example Item C	\$ 3,700.00	\$ 0.00	Example Description				
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 %

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

7. Construction	\$ 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 %		
<input checked="" type="checkbox"/> Reimbursement Request*				
	\$ 55,000.00			
<input type="checkbox"/> 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 your 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.

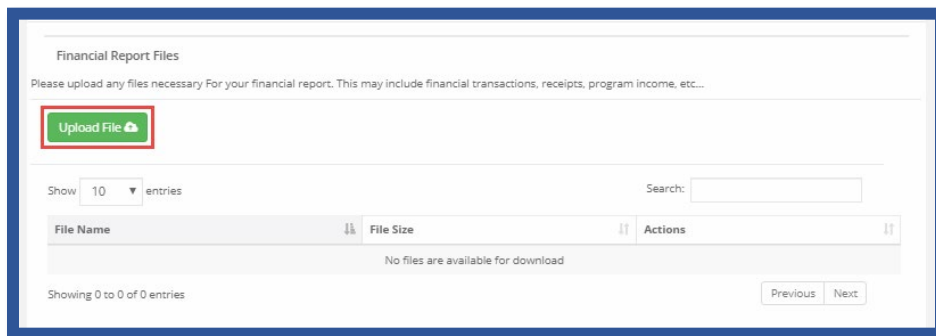
- b. *Financial Report Narrative*: Include any spending and/or program income details, as well as a brief description about the reporting period's expense. If you are submitting a corresponding progress report for your grant (if applicable), please include a note in the narrative field.

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



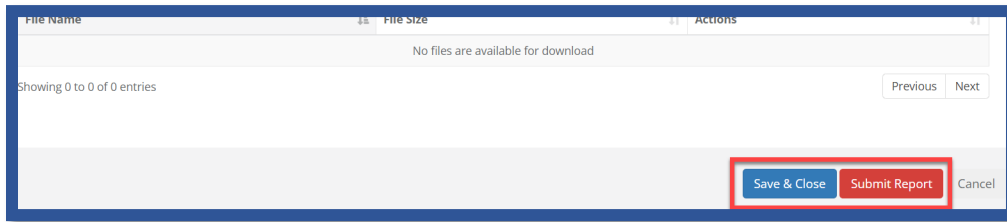
- 9) You will need to upload a signed invoice cover sheet along with separate supporting documentation files for the cost categories which you are reporting costs for the grant. You can upload any documents, including PDFs and scanned images, to the Financial Report. Please **do not** use special characters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

NOTE: Documentation for indirect costs is **not** necessary.

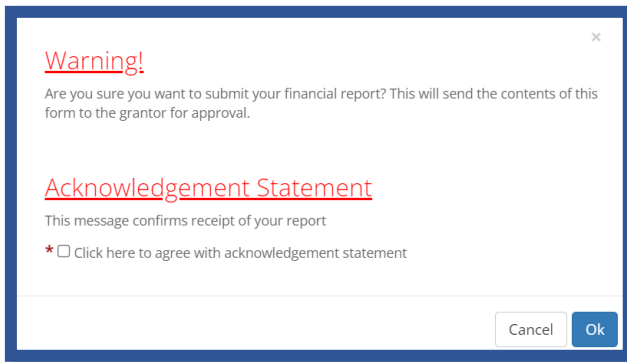


File Name	File Size	Actions
Contractual.pdf	55.7 KB	
Invoice.pdf	140.1 KB	
Other.pdf	1.4 MB	
Sal-Ben.pdf	103.2 KB	

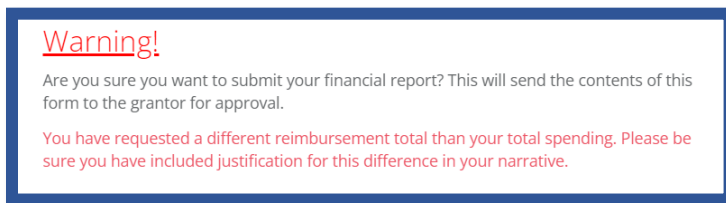
- 10) You may click on the **Save & Close** button to save a draft of your financial report to complete later. **Or** if you are finished with your financial report and ready to submit, click on the **Submit Report** button.



11) Review the final warning message, confirm the Acknowledge Statement with the provided checkbox, then click on the **Ok** button 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 and you can click on the **Ok** button to proceed with submitting the financial report.



12) You will be taken back to the *Award Detail* page, where the Financial Report will now be recorded under the *Award Activities* section. By viewing the *Current Status* column of this section, 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:

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

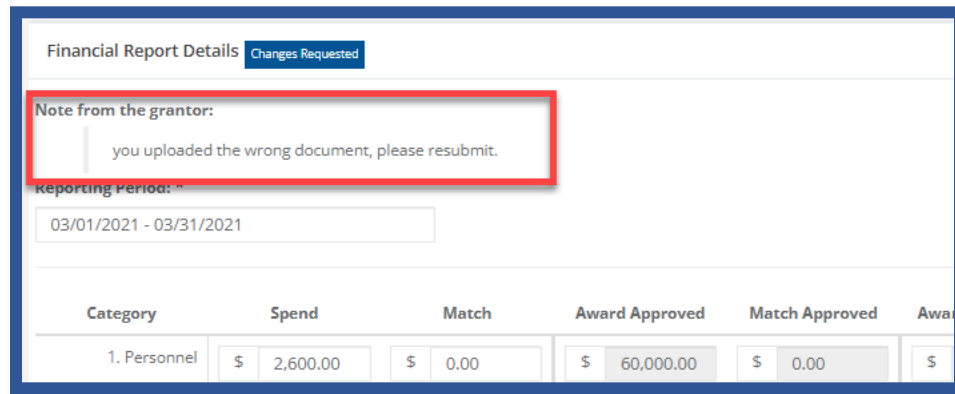
NOTE: These columns can be reorganized by clicking on any column title.

1. **Report:** Shows the report type.
2. **Reporting Period:** Date range of items in the report
3. **Created by:** Team member who submitted the report
4. **Date Created:** Date that 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 for a financial report that is liquidating advance funds with no additional reimbursement requested by grantee).
 - *Approved/Awaiting Payment:* CAL FIRE has approved the report but has not yet processed payment.
 - *Approved/Paid:* CAL FIRE has approved the report and payment has been issued to the grantee.
 - *Changes Requested:* CAL FIRE is requesting corrections to the financial report.

- **Rejected:** The report has been rejected and **cannot** be re-submitted. If you click on **View Report** from the *Actions* menu, you can check for any notes 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 returned report and resubmit it. The report will contain a comment from CAL FIRE (above the report table) that details the request.

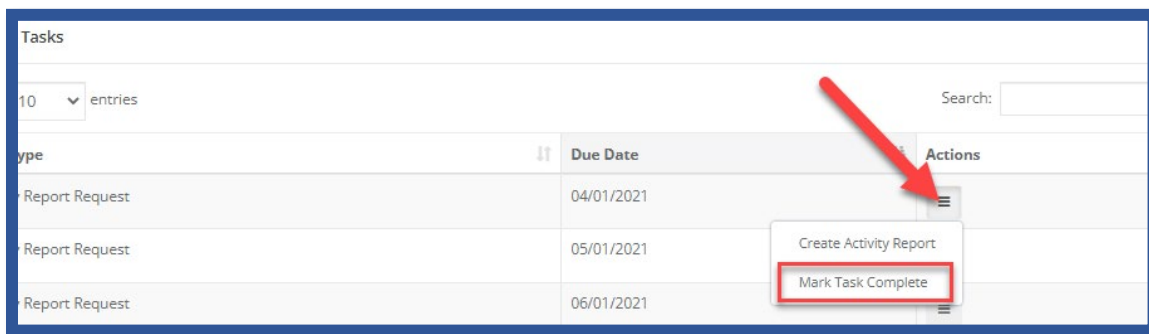
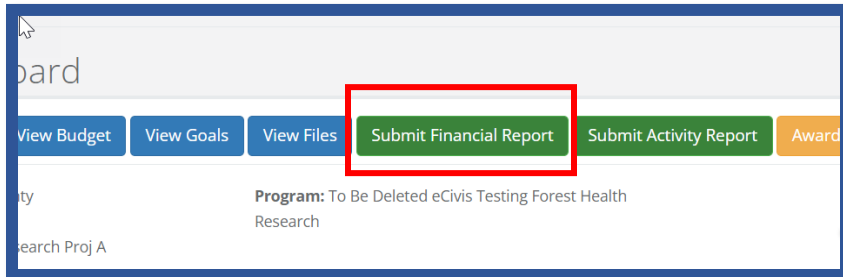


The screenshot shows the 'Financial Report Details' page with a 'Changes Requested' tab. A red box highlights a note from the grantor: 'you uploaded the wrong document, please resubmit.' Below the note is a 'Reporting Period' field with the value '03/01/2021 - 03/31/2021'. At the bottom, a table displays financial data for '1. Personnel'.

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

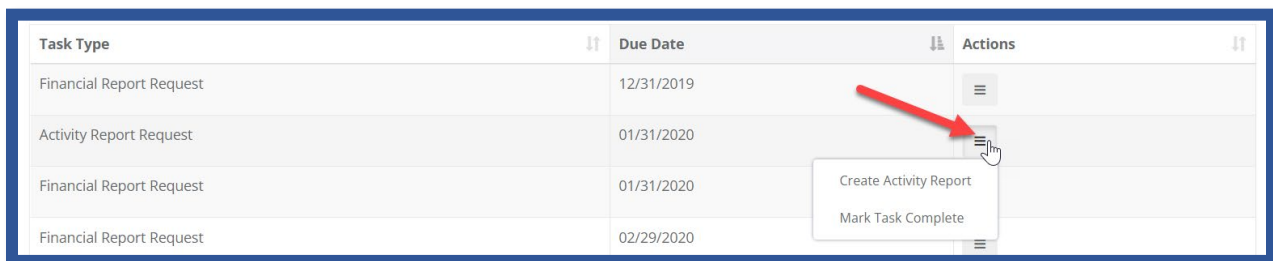
- **View Report:** Any report that is submitted and is **not** in a status of “Changes Requested” will **only** have the option to view the submitted report and any comments added in response by CAL FIRE.

- 13) If you created your Financial Report as a new (unscheduled) report using the **Submit Financial Report** button at the top of your *Award Dashboard*, you will still need to address the pending task due for that Financial Report request. In your *Pending Tasks* section, click on the *Actions* icon next to that task and select **Mark Task Complete**.

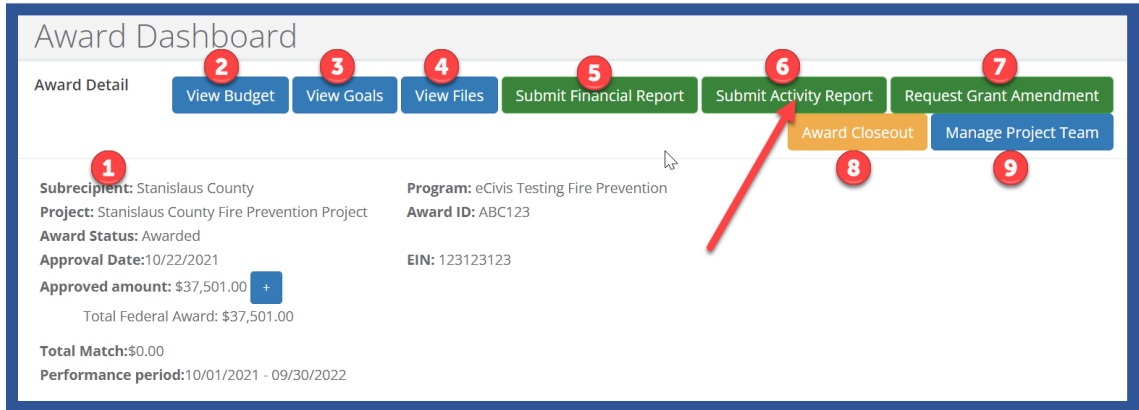


5.2. Submitting Activity Reports

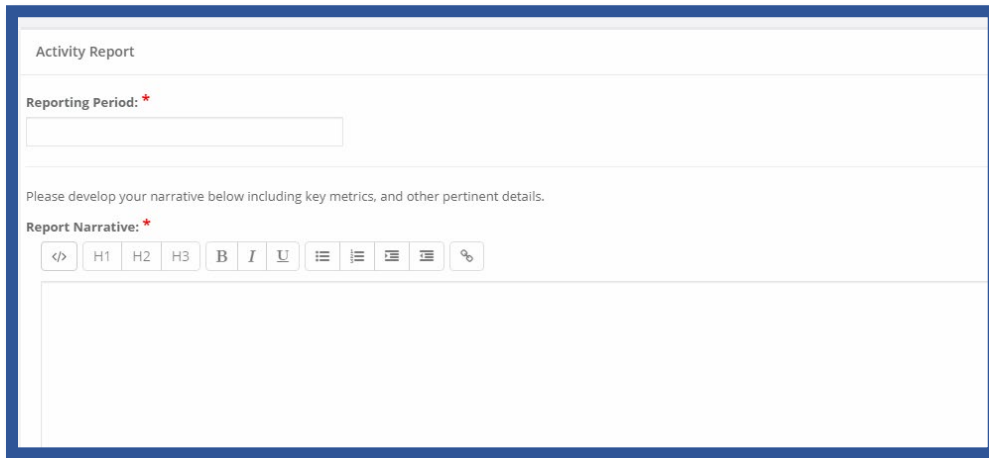
- 1) Within the *Pending Tasks* section of the *Award Dashboard*, locate the Activity Report request that is due, click on the *Actions* menu icon, then select **Create Activity Report**.



- a. If a task is **not** present, scroll to the top right of your *Award Dashboard*, then click on the **Submit Activity Report** button.



2) Fill in the details of your Activity Report and attach any pertinent files. Please refer to your program’s grant guidelines for specific files that must be submitted.



3) Updating Goal/Activity Report Metrics:

- a. Most goals will have subgoals which will require you to click on the + button (on the right-hand side of that subgoal line) to add additional rows to report on.
- b. The left-hand dropdown list shows the available subgoals you can select from.
- c. Proceed to fill in the corresponding fields under each column:
 - i. *Completed Units* – Units achieved during this reporting period
 - ii. *Award Spend* – Amount spent to achieve this outcome during this specific reporting period

- iii. *Match Spend* – Amount spent to achieve this outcome during this specific reporting period
- iv. *Program Income* – Amount earned while completing this goal/subgoal during this specific reporting period

NOTE: Not all programs require reporting on goal/activity metrics. Please reach out to your CAL FIRE Program/Region contact if you have any questions on whether or not you are required to complete this task 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 on the green **Upload File** button (refer to your program’s grant guidelines to check for any documentation that may be required).

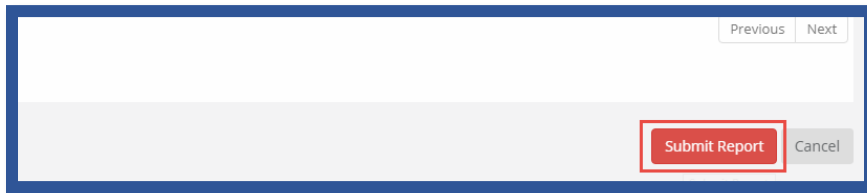
Activity Report Files

Please upload any files necessary for your activity report.

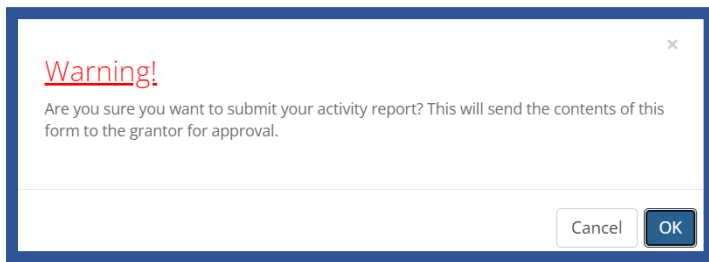
Show 10 entries

File Name	File Size	Actions
No files are available for download		

5) Click on the **Submit Report** button.



6) Review the warning message and click on the **OK** button to finish submitting the activity report.



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

A screenshot of the 'Award Activities' table. The table has six columns: Report, Reporting Period, Created By, Date Created, Current Status, and Actions. Red circles with numbers 1 through 6 are placed over each column header. The table contains six rows of data, including 'Financial Report' and 'Activity Report' entries with various statuses like 'Approved / Awaiting Payment', 'Approved / Paid', 'Pending Approval', 'Changes Requested', 'Rejected', and 'Approved'. At the bottom, there are 'Previous', '1', 'Next', and 'Reload' buttons.

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

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

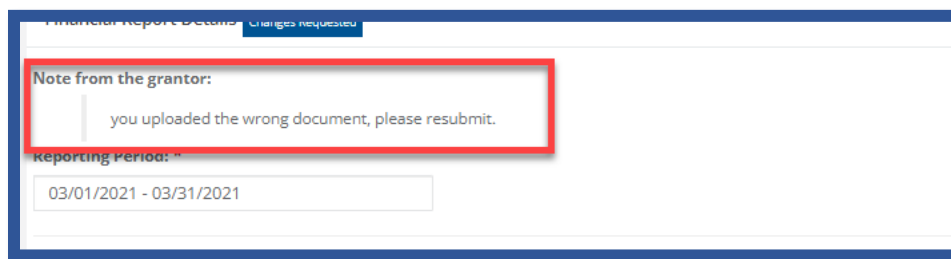
1. **Report:** Shows the report type
2. **Reporting Period:** Date range of items in the report
3. **Created by:** Team member who submitted the report
4. **Date Created:** Date that the report was saved

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*: CAL FIRE is requesting corrections to the activity report.
- *Rejected*: The report has been rejected and **cannot** be re-submitted. If you click on **View Report** from the *Actions* menu, you can check for any notes CAL FIRE may have provided on the report to explain the reason for the rejection.

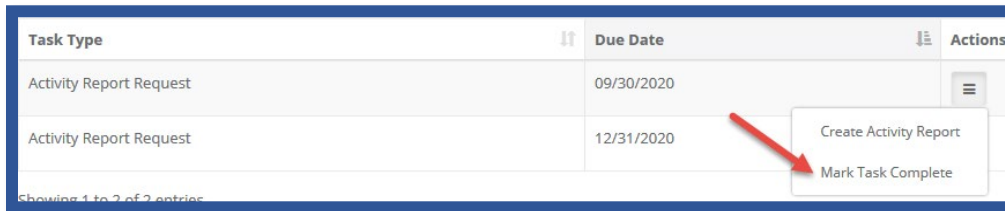
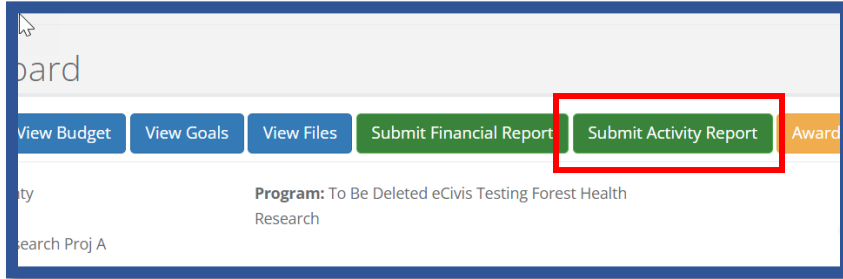
6. Actions:

- *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 returned 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 **only** have the option to view the submitted report and any comments added in response by CAL FIRE.

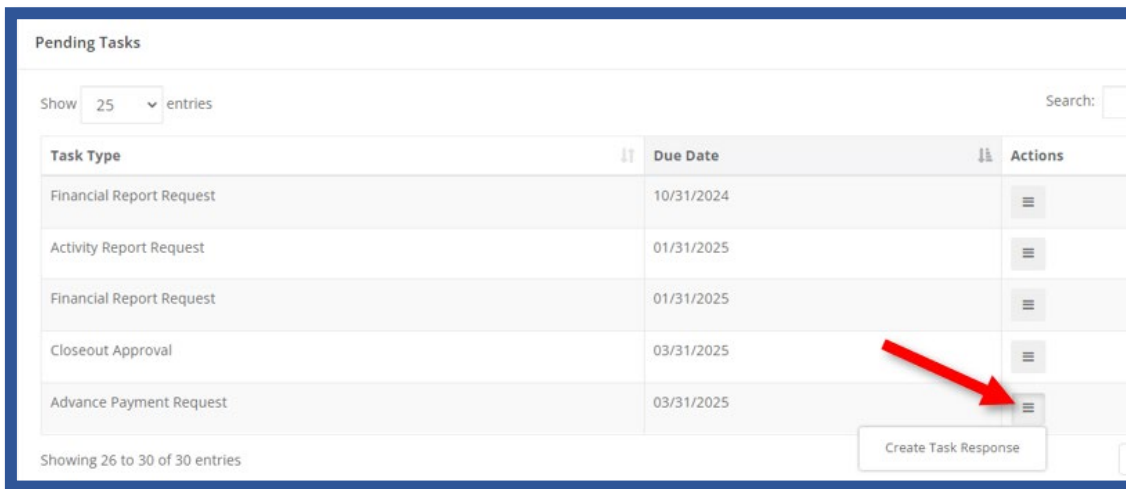
8) If you created your Activity Report as a new (unscheduled) report using the **Submit Activity Report** button at the top of your *Award Dashboard*, you will still need to address the pending task due for that Activity Report request. In your *Pending Tasks* section, click on the *Actions* icon next to that task and select **Mark Task Complete**.



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 on the **Actions** icon next on the corresponding task line, then select **Create Task Response**.



- 2) Read the Task Note (1), enter the Subrecipient Response/report narrative (2), upload your supporting documentation according to your program's grant guidelines and the Task Note (3), then click on the **Submit Task** button (4).

Advance Payment Approval - 11/19/2021

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

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

4
Submit Task Cancel

Examples of Miscellaneous Tasks you may see in your *Pending Tasks* section may include, but not be limited to:

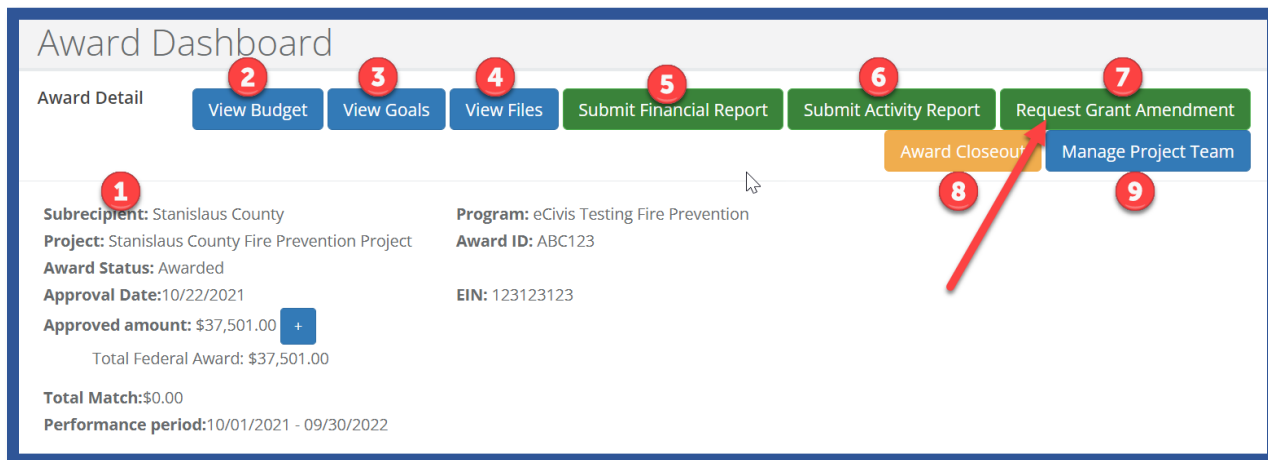
- Advance Payment Requests: **Optional** task for grantees to request advance funds (if eligible) to work on the grant project
- Advance Payment Accountability Report: Task required for grantees of certain programs that have received advance funds
- Jobs Reporting: Task required to report jobs benefits for certain grant awards

If you believe that there are tasks missing from your *Pending Tasks* list, please reach out to your CAL FIRE Program/Region contact so that they can assess whether those tasks need to be added to your list or not.

6. How Do I Request a Grant Amendment?

Prior to submitting an amendment, it is highly recommended to speak with your CAL FIRE Program/Region contact to determine if an amendment for your project is possible and any documentation that will be needed.

- 1) To submit a grant amendment, click on the **Request Grant Amendment** button from the *Award Dashboard*.



- 2) Verify the basic award details. If you are requesting an extension to your grant expiration date, you will need to change the existing date in the *Performance Period End* field to the new expiration date you are requesting. Click on the **Save and Continue** button.

The image shows a screenshot of the 'Grant Amendment' form. The form is titled 'Grant Amendment' and has four tabs: 'AWARD DETAILS', 'FINANCIAL INFORMATION', 'FINALIZE GOALS', and 'ATTACH FILES'. The 'AWARD DETAILS' tab is active. The form contains the following fields: 'Organization Name:*' with the value 'Stanislaus County', 'Project Name:*' with the value 'Stanislaus County Fire Preventic', 'EIN:*' with the value '123123123', and 'Performance Period End:*' with the value '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.

Budget Settings

This amendment includes a financial change

Multi-Term Budget: No Yes

Indirect Costs: Not Applicable, 0.00 %

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

Budget Stage: Post-Award

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 Totals:	\$27,500.00	\$45,000.00	\$0.00	\$0.00

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

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

FINALIZE GOALS

Please review your goals

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

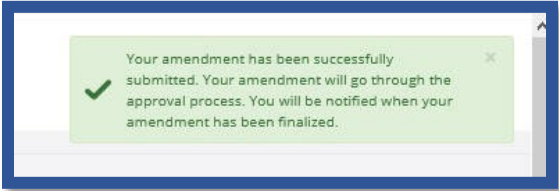
- 5) Lastly, upload any documentation needed to support your amendment request by clicking the **Upload File** button (refer to your program's grant guidelines to check for any required documentation), include additional notes/clarification in the *Amendment Narrative* section, and click on the **Submit Amendment** button.

The screenshot shows the 'Grant Amendment' form with three progress steps: 'AWARD DETAILS', 'FINANCIAL INFORMATION', and 'ATTACH FILES'. Below the progress bar, a message states: '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.' A green 'Upload File' button with a cloud icon is highlighted with a red box. Below this is the 'Amendment Files' section, which includes a search bar and a table with columns for 'File Name', 'File Size', and 'Actions'. The table currently shows 'No files have been uploaded'. Below the table is the 'Amendment Narrative' section, which has a rich text editor with a toolbar containing icons for undo, redo, bold, italic, underline, link, unlink, list, and link. The text area is empty, and a character count at the bottom left indicates '8000 characters remaining'. At the bottom right, there are 'Back' and 'Submit Amendment' buttons, with the latter highlighted by a red box.

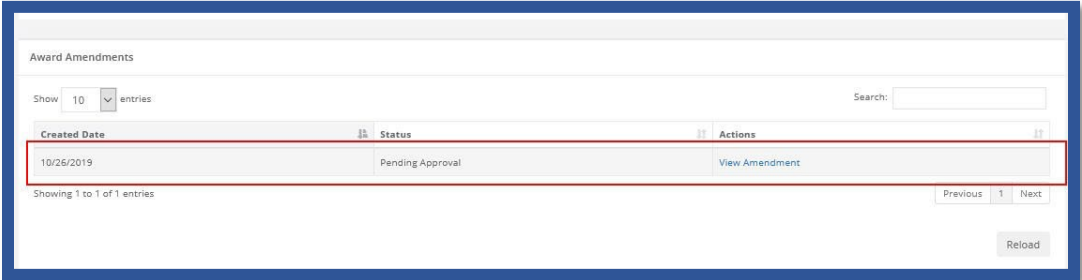
- 6) In the following pop-up window, include any final notes for CAL FIRE to consider, then click on the **Save** button.

The screenshot shows a 'Submit Amendment' pop-up window. The title bar includes a close button (X). The main text reads: '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:'. Below this is a large text area for entering a note, with a character count at the bottom left indicating '5000 characters remaining'. At the bottom right, there are 'Cancel' and 'Save' buttons.

7) A notification will pop up stating that your amendment was successfully submitted.



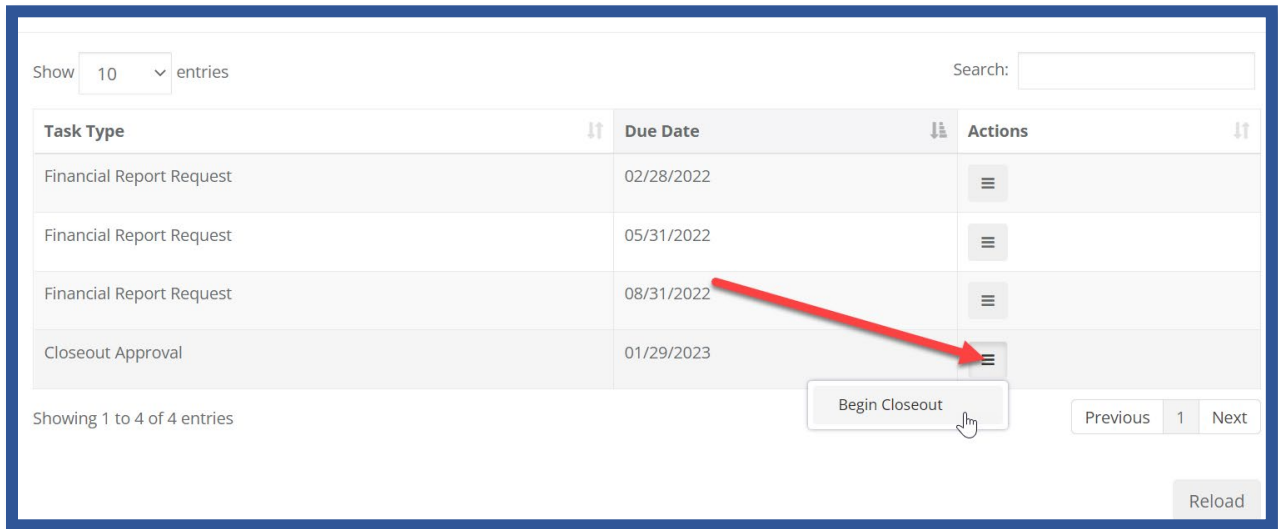
8) You can locate the status of your amendment in the *Award Amendments* section.



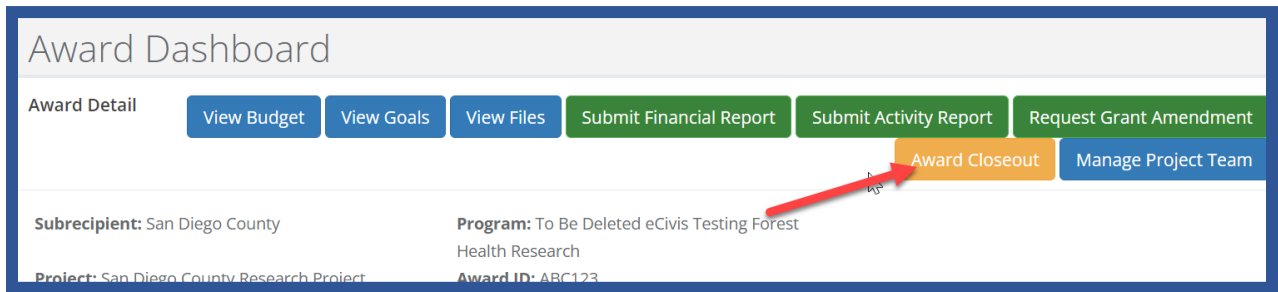
7. How do I close out my Grant?

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 closeout process, look for a pending task titled “Closeout Approval”, click on the corresponding *Actions* icon for that task, then select **Begin Closeout**.

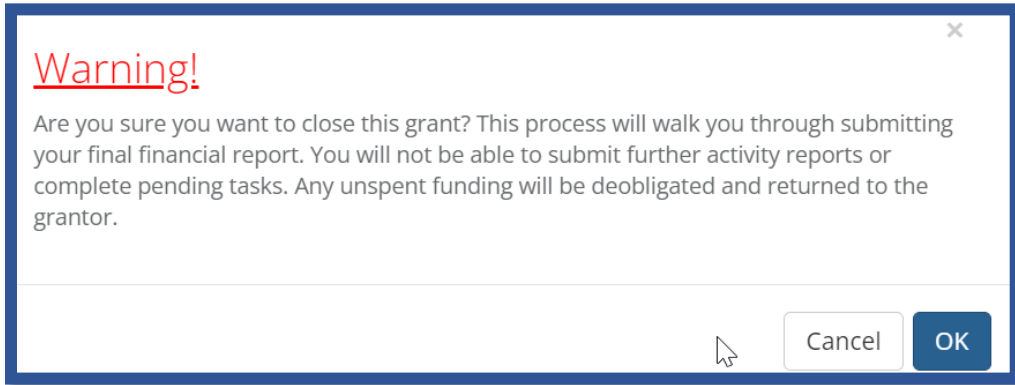


- 2) If the above option is **not** present, you can click on the **Award Closeout** button from the header of the *Award Dashboard*.



- 3) A warning message will appear, and you will be required to click on the **OK** button if you wish to continue. The message will read:

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.



- 4) You will 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).

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	

- a. Ensure that the “Total Disbursed” and “Total Spend to Date” amounts **match**.

NOTE: If the “Total Disbursed” and “Total Spend to Date” amounts **do not match**, ensure that there are no pending financial reports for your award. If there **are** pending reports, those must first be approved/denied by CAL FIRE before you can move forward with award closeout.

- b. In addition, you will see a warning message above the spending table that will read:

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
	\$ 0.00	\$ 0.00	

c. Click on the **Submit Report** button.

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](#)

d. Once submitted, the *Award Dashboard* will show **only** the buttons for viewing your award details such as your 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.

The screenshot shows the 'Award Dashboard' for a grant. It includes the following information:

- Award Detail** (with 'View Budget' and 'View Files' buttons)
- Subrecipient:** San Diego County
- Project:** San Diego County Research Project
- Award Status:** Closeout
- 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
- Program:** Forest Health Research
- Award ID:** ABC123
- EIN:** 234234234

A red-bordered box at the bottom contains the following text: "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."

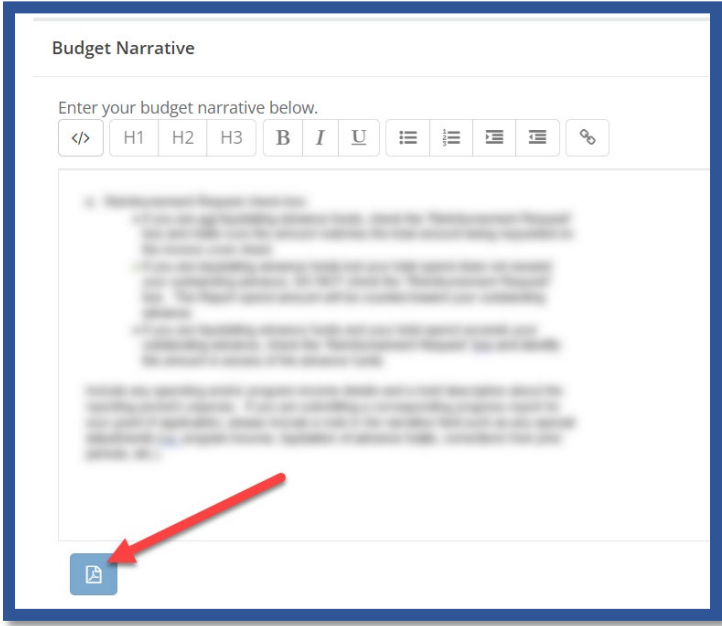
e. Below are options for exporting and printing your historical award information:

- i. If you click on the **View Budget** button and then click on the **Excel Export** button, you will be able to export the table into an Excel spreadsheet.

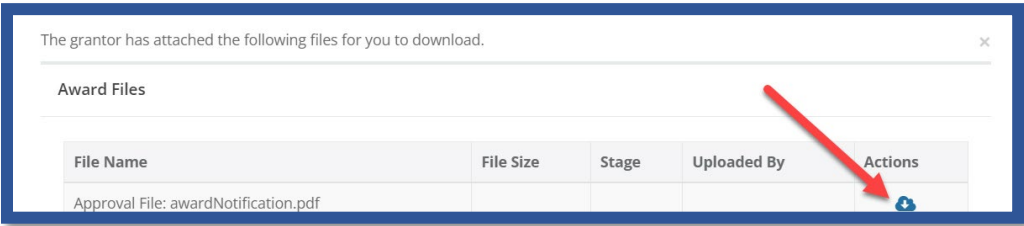
The first screenshot shows a close-up of the 'View Budget' and 'View Files' buttons, with 'View Budget' circled in red. The second screenshot shows the 'Application Budget for San Diego County' page. It includes the following information:

- Program:** Forest Health Research
- Project name:** San Diego County Research Project
- Return to Award** button
- Budget Stage:** Post-Award
- Actions:** A button with an Excel icon, highlighted by a red arrow.

- ii. To export the Budget Narrative, click on the **PDF Export** button.

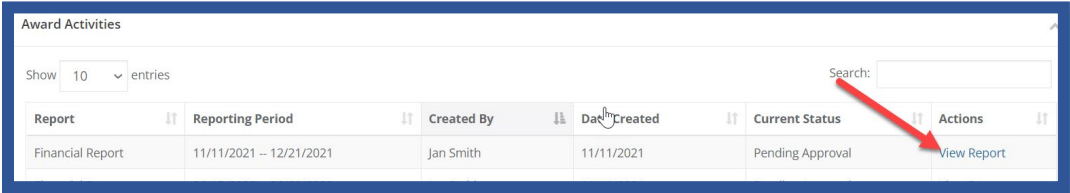


- f. If you click on the **View Files** icon, a pop-up will appear where you can then click on the **Download** icon for each file you need to download.



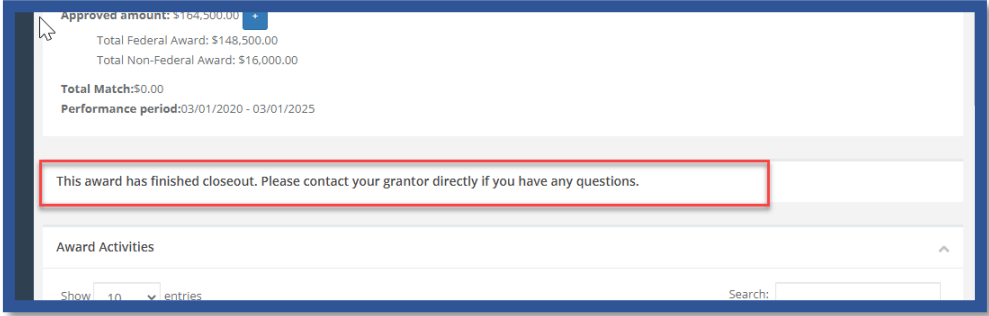
- g. If you click on a report using the **View Report** button from the *Award Activities* table of your *Award Dashboard*, you can print the report by pressing the “ctrl” button on your keyboard.

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.



- h. Once your closeout report is approved, you will receive a notification by email and the message on your *Award Dashboard* will 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.

Glossary of Terms

Term	Definition
Activity Report	Also referred to as a Progress Report. A summary of activities performed over a given period of time (usually defined by CAL FIRE) 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 CAL FIRE that a recipient has been accepted and outlines the award details.
Award Dashboard	In <i>Grants Portal</i> , the <i>Award Dashboard</i> 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 intended 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, which budget items will be covered by the grant, and which ones will be covered by matching funds (i.e., 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 <i>Budget Settings</i> for your budget worksheet. If included as a “Percentage”, you can check or uncheck this field to include it in your total <i>Cost Share</i> amount. If included as “Itemized”, you can put any amount desired for this item in the <i>Cost Share</i> field. If included as “Not Applicable”, you can mark this budget item as “Cost Share” and the amount entered in the <i>Cost</i> field will be included in your total <i>Cost Share</i> amount.
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 Grants Portal Account	An online service which allows interested applicants to create a free account so they can save, collaborate, and apply for grant 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	Also referred to as an Invoice. A report that tracks spending and reimbursement requests that the subrecipient will send to the CAL FIRE from their <i>Grants Portal</i> account. This report will be used to submit all approved grant expenditures.
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 <i>Grants Portal</i> , 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	The section of <i>Grants Portal</i> that gives you access to all grant programs that you have been awarded.
My Profile	The section of <i>Grants Portal</i> that gives you access to your profile information.
Negotiated Rate	This should be used if you have negotiated an indirect cost rate with CAL FIRE.
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	The sum of program income line items listed in the <i>Program Income</i> section. Represents revenue generated as a result of the grant funds provided. Program income may include, but not be limited to, interest income from advanced funds, sale of forest products resulting from implementation of a 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 <i>Portal</i> user, which will be used when submitting an 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 <i>Grants Portal</i> requesting reimbursement from CAL FIRE for grant-related expenses.
Role	This defines who the user is in a <i>Portal</i> account.
Subrecipient	Also referred to as Grantee.
Team Member	Not the original applicant. This is a user added to an award to assist and collaborate on the awarded grant. These individuals are invited to help track the award and submit reports.
Total Direct Costs	Sum of all Direct Costs 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.