EUNA Grants
Powered by eCivis

eCivis Portal

Applicant User Guide

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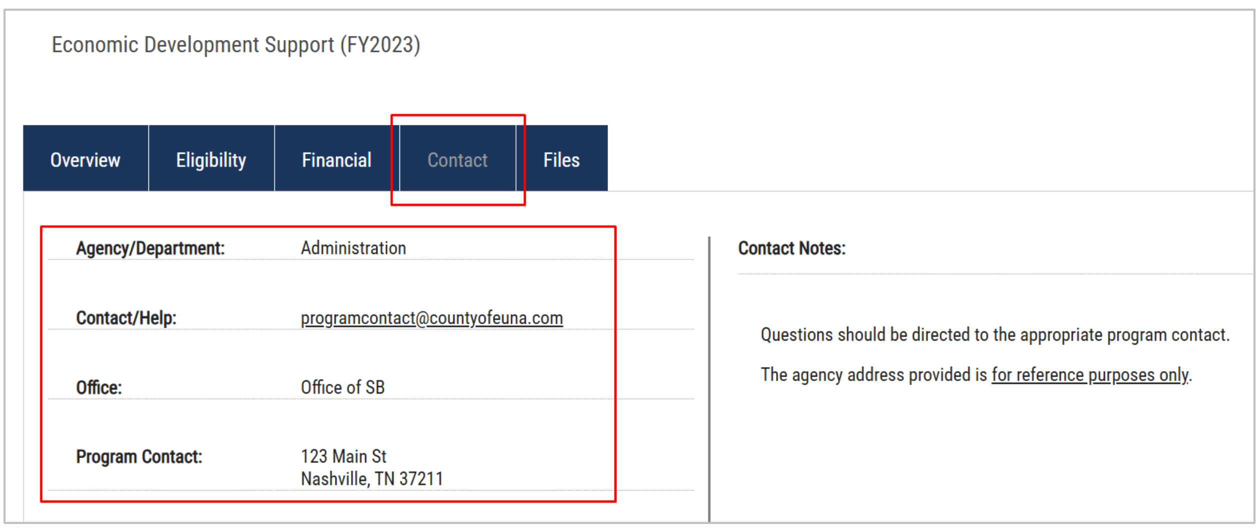
About eCivis Portal

For programs distributed through the eCivis Portal system, applicants have a simple and effective way to manage 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 program administrators (often listed on the "Contact" tab of the program's solicitation):

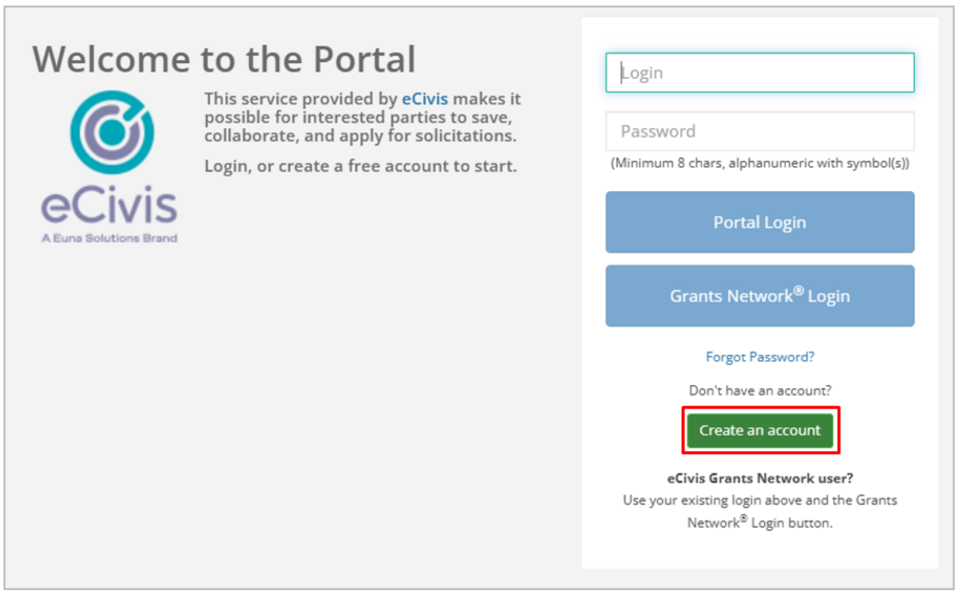


Creating an Account

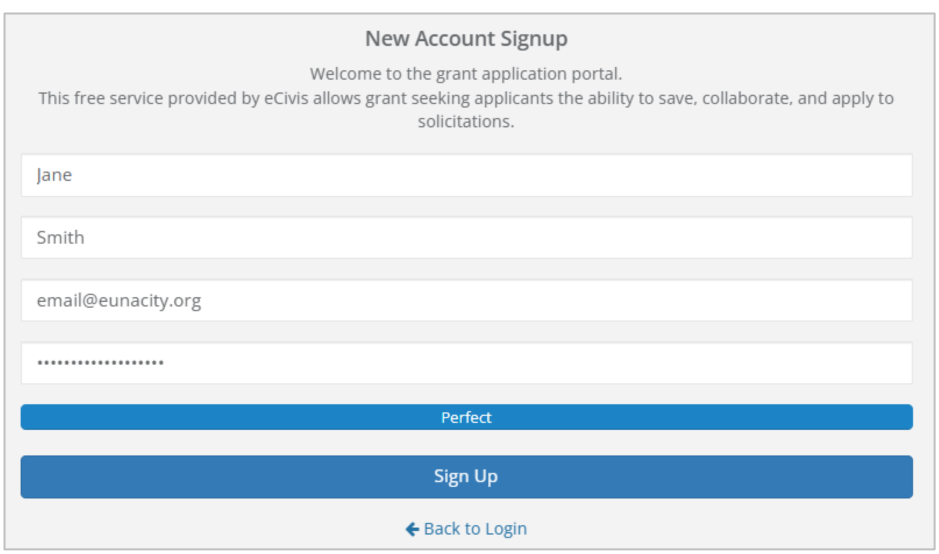
If you are applying to a program solicitation, you will need to set up a Portal account at https://portal.ecivis.com/#/login. (Use the “Forgot Password?” link if you have an account but need to reset your password)

***Note:** eCivis *Grants Network* users can use their Grants Network credentials, click Grants Network Login, and skip to the “Setting up your account profile information in ‘My Profile’” instructions below. (If you need to reset that password, visit https://gn.ecivis.com and click the “Forgot Login Info” link at that page)

1. Click “Create an account”

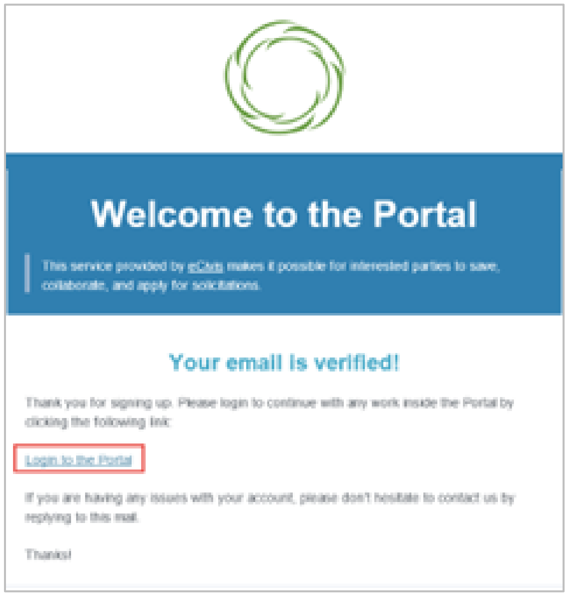


2. Enter your name, email, and desired password. Then click “Sign Up”

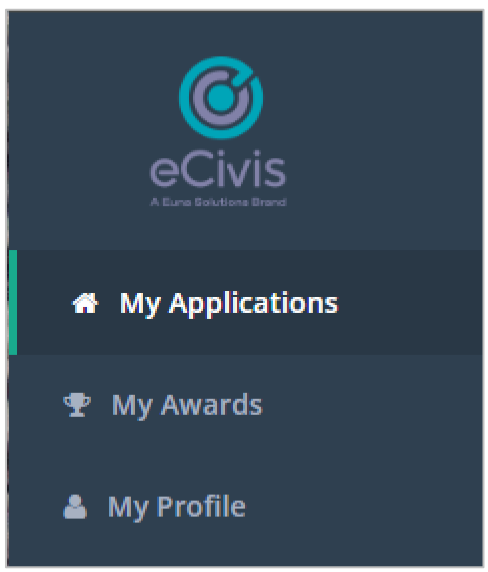


3. This will send you a confirmation email. You will need to click on the Portal link within that confirmation email to activate your account:

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



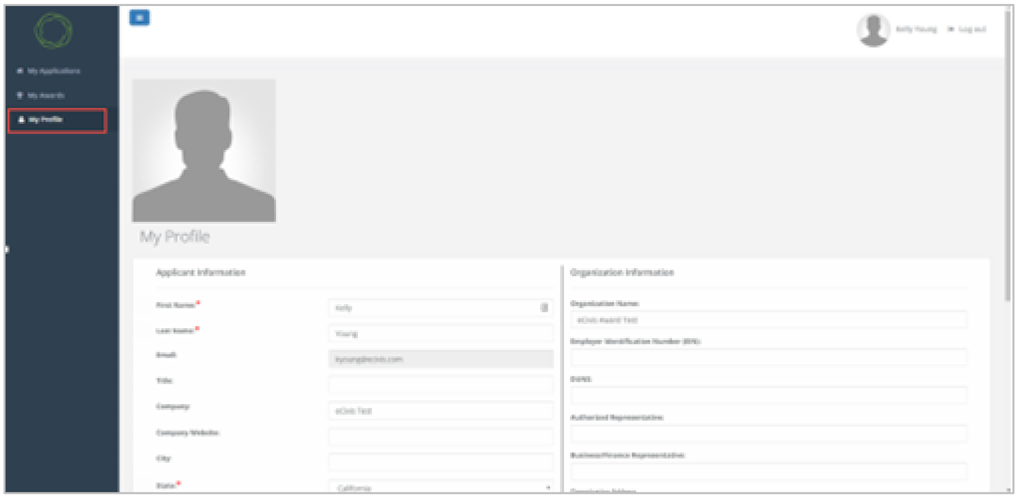
2. When you log into Portal, you will see a navigation bar on the left of your screen:



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

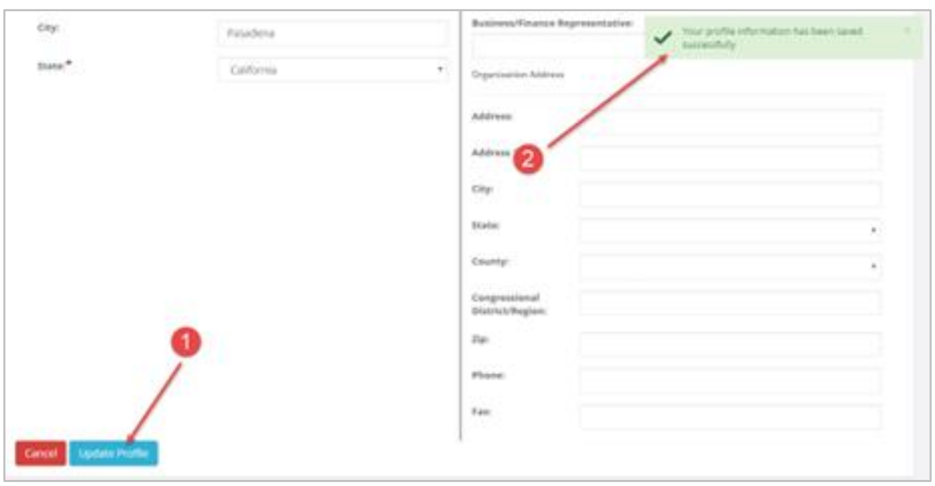
3. Setting up your account profile information in “My Profile”

   a. Ensure that the required fields within the “My Profile” section are complete before continuing on to any applications.



   b. Then, click on the “Update Profile” button on the bottom of the screen

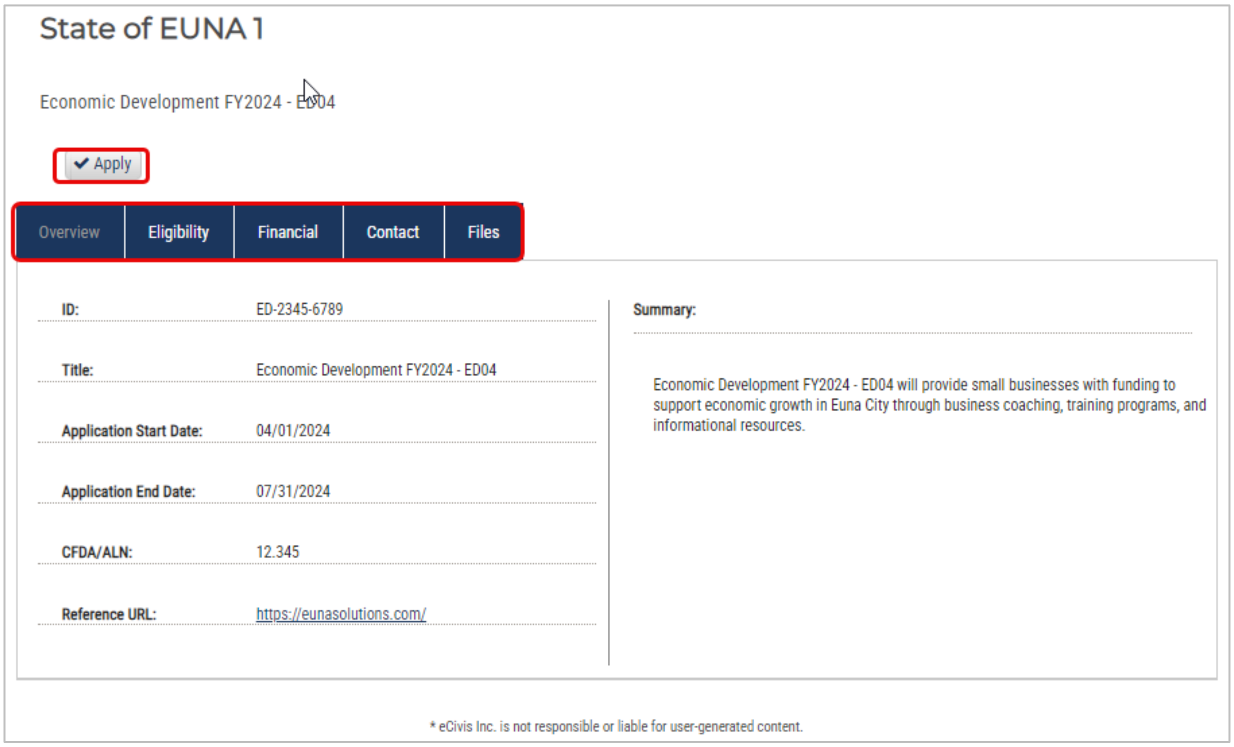
   c. A green success message should appear in the top right corner of your screen:



3. If you ever need to edit your profile, you can do so by clicking “My Profile” in the left-side navigation bar within Portal.

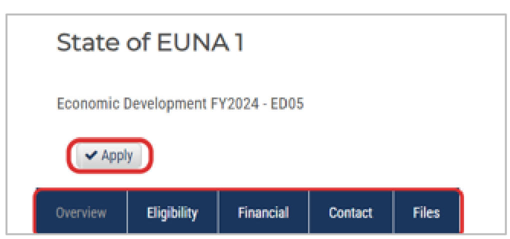
Reviewing the Program Solicitation

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



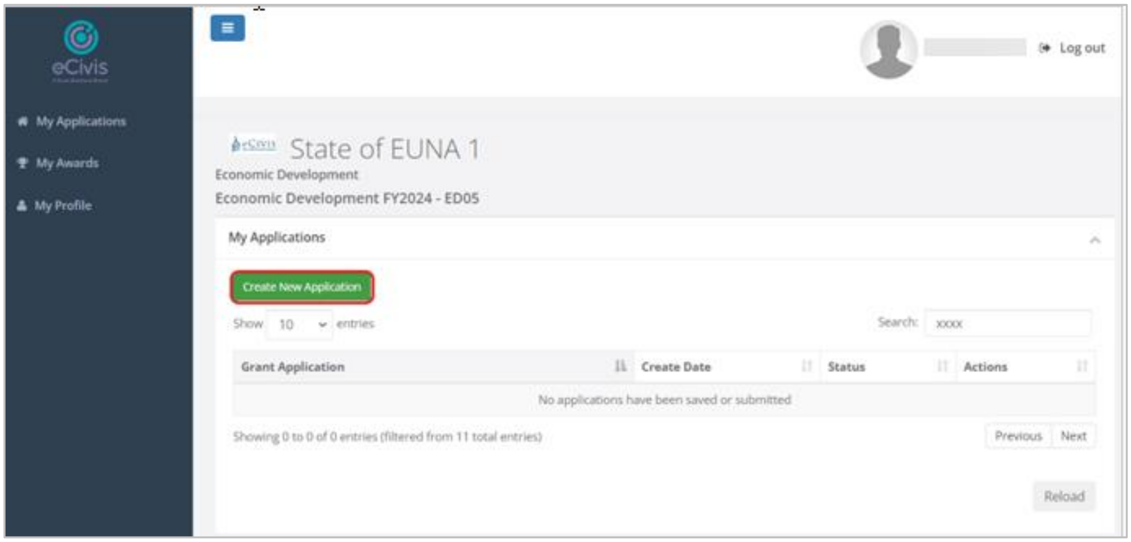
Starting a New Application

1. Click the “Apply” button on the program’s Solicitation page to begin the application process in eCivis Portal.

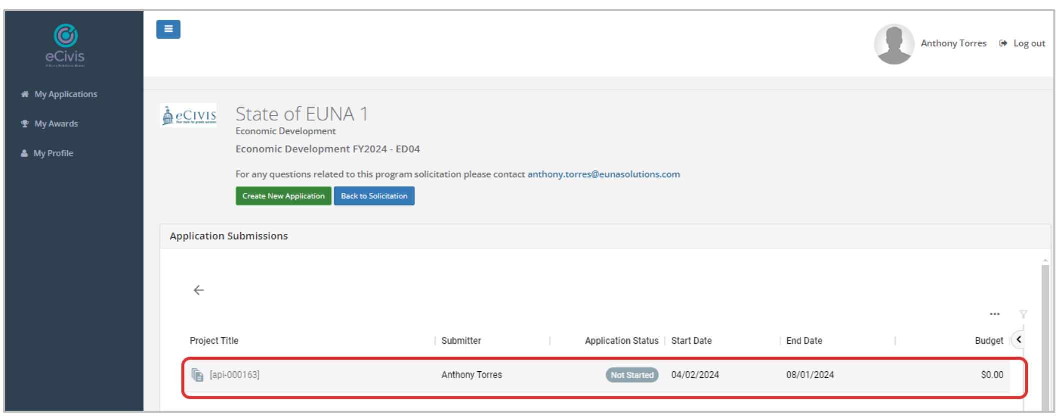


2. Log into your Portal account using the instructions from the “Creating an Account” chapter above

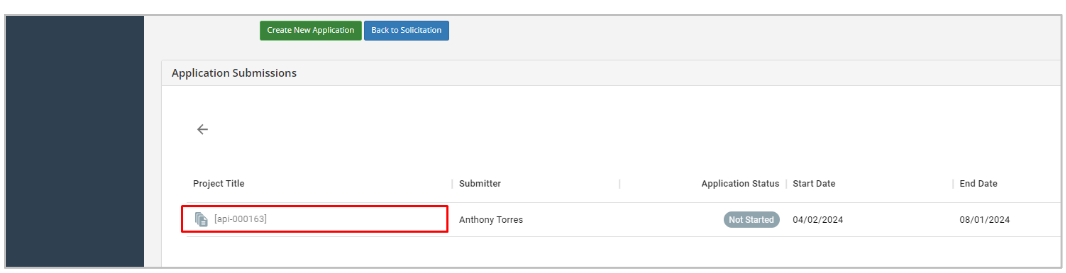
3. Click “Create New Application”



4. The new application will appear in the Application Submissions table.
*__Note:__ If the program allows multiple application submissions from the same applicant, this table will list any other application submissions you create toward this Program.

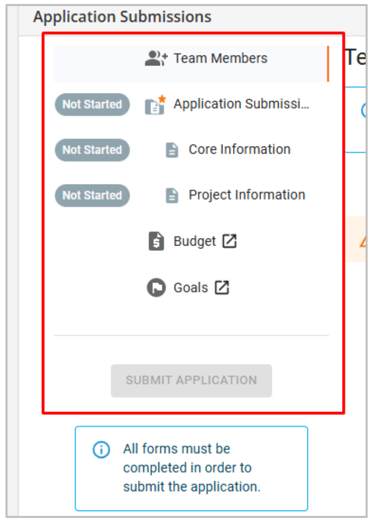


5. Click on the newly added Project Title (labeled with a unique code beginning with “api-“)



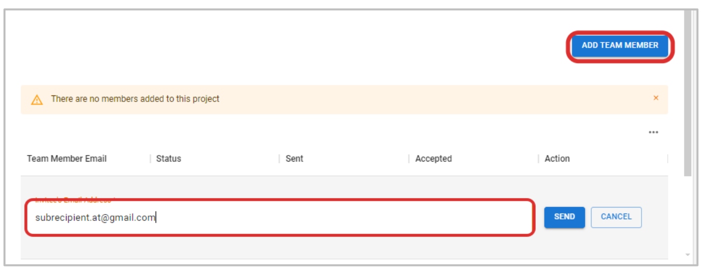
Completing and Submitting an Application

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.

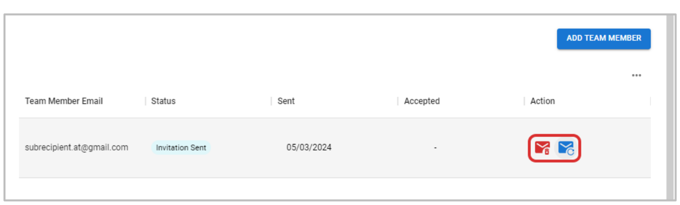
    a. Click "Add Team Member"



    b. Enter the invitee's Email Address and click "Send"

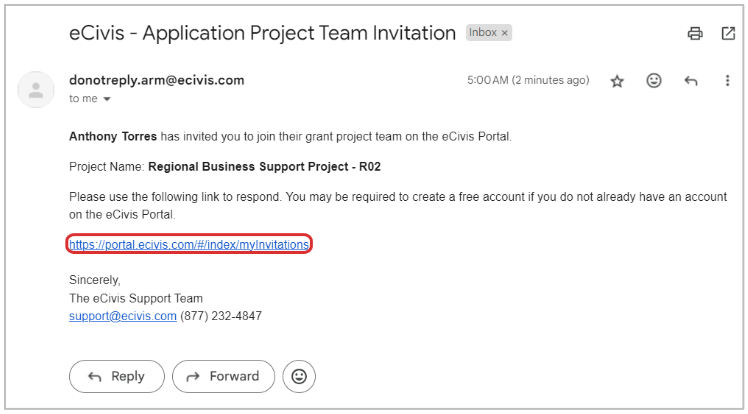
    c. Project Team Members invitations will be sent and be listed in the status as "Invitation Sent".

    *__Note:__ If the invitation needs to be deleted, you can click on the red envelope icon and if it needs to be resent you can click on the blue invitation icon.

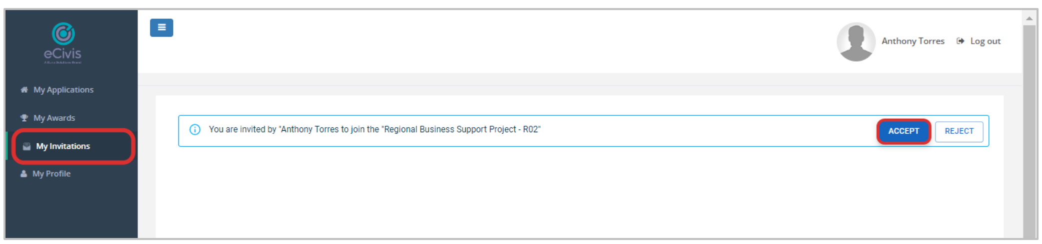


d. The invitee will receive an email to access eCivis Portal and accept the invitation.

*Note: In order to respond and accept the invite, the invitee must set up a Portal account if they have not already done so

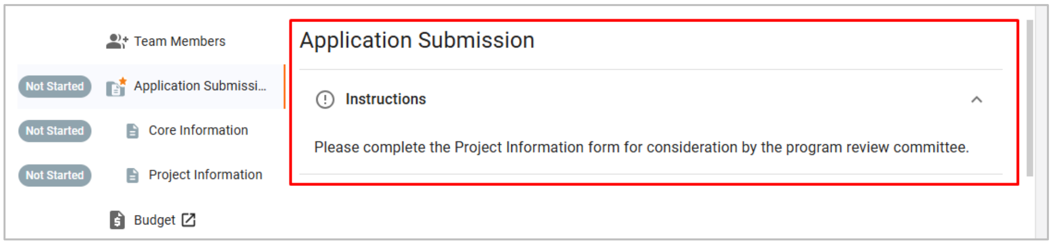


e. In Portal, they will click My Invitations from the navigation bar and click Accept or Reject on this invite.



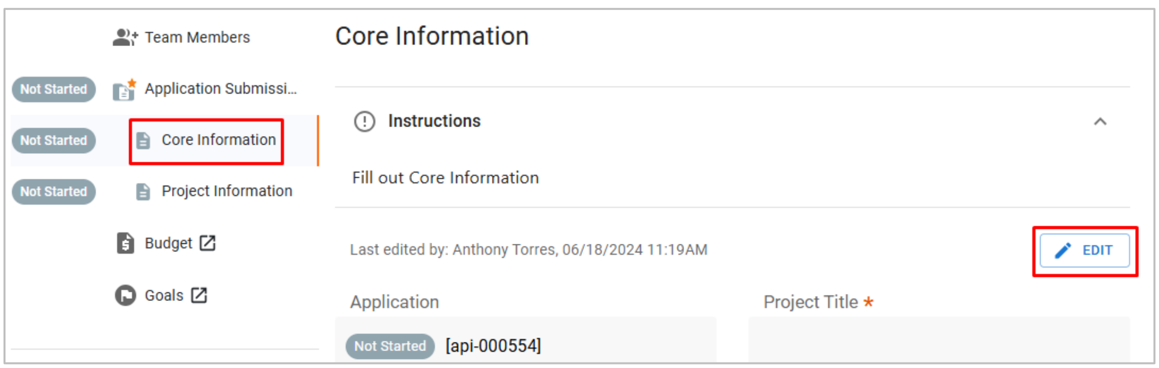
2. **Submission Stage:** The starred folder icon indicates the current Submission Stage to be completed

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

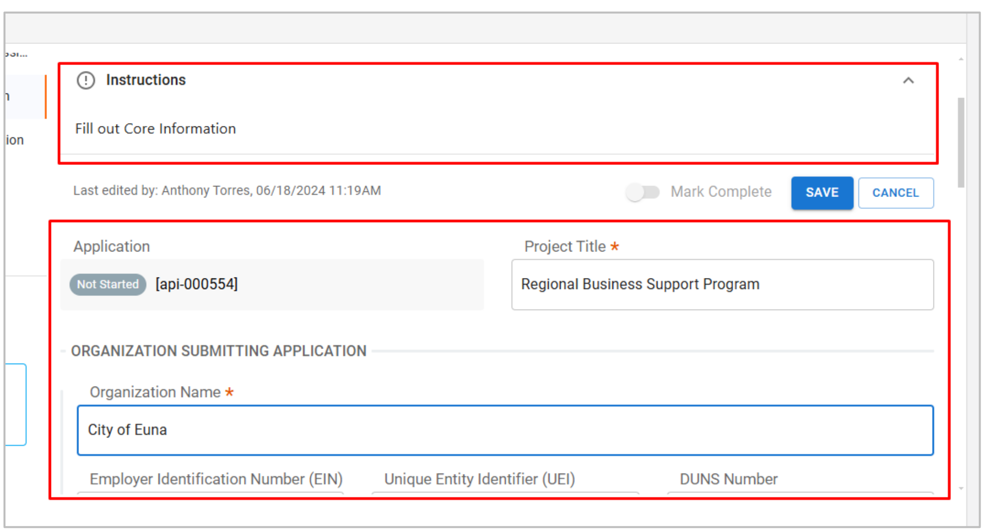


3. **Application Forms:** Open and edit each form until complete

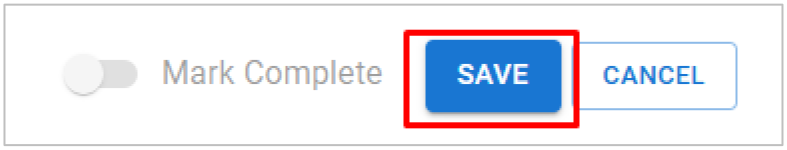
   a. Select the form from the left-hand panel and click Edit



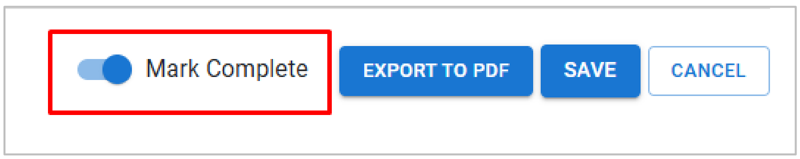
   b. Expand the Instructions section to review important details provided by the Grantor before continuing to fill the form.



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

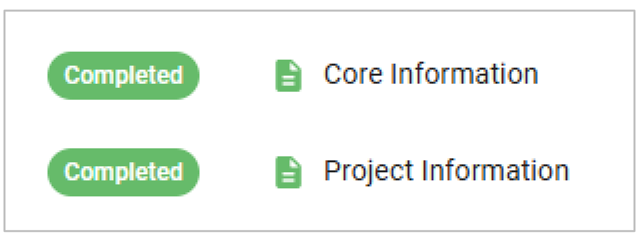


d. Click “Mark Complete” when you have finalized all edits. Toggle this field back to the “off” position if you need to make further edits before submitting.

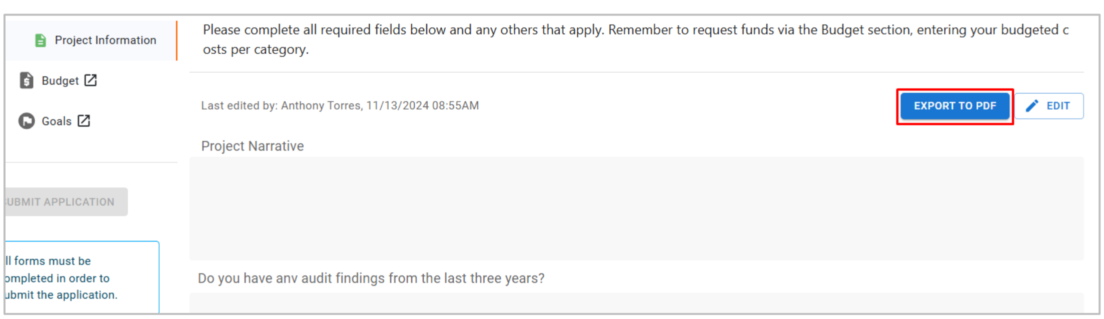


e. Any forms you mark complete will update to the green “Completed” status

*__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 the “Submit Application” button. Continue to the next section for those instructions.

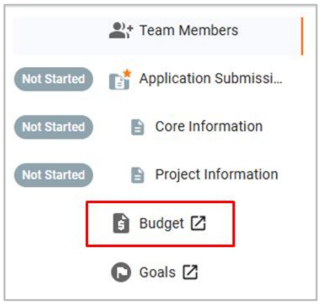


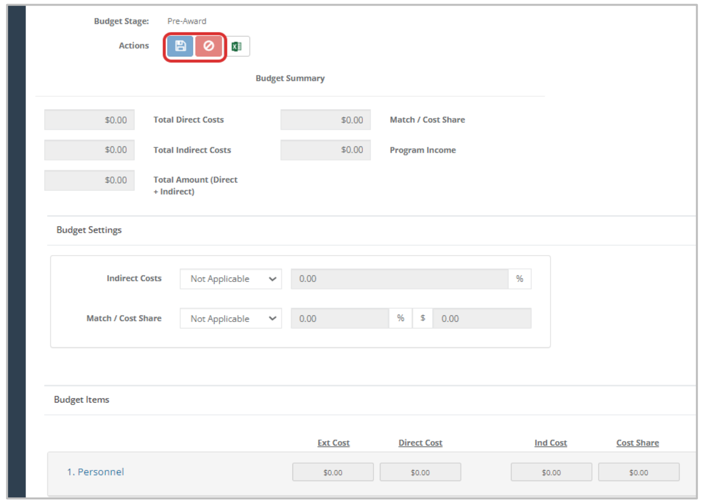
f. To export a copy of the filled application to PDF format, click “Export to PDF” from the top-right corner of the page



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

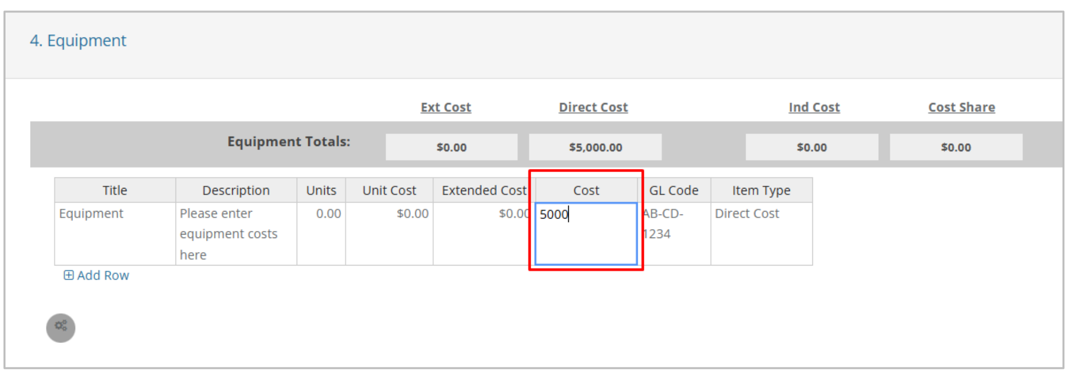
   a. Click "Budget" from the left-hand bar. The Budget Worksheet will open in a separate browser tab.



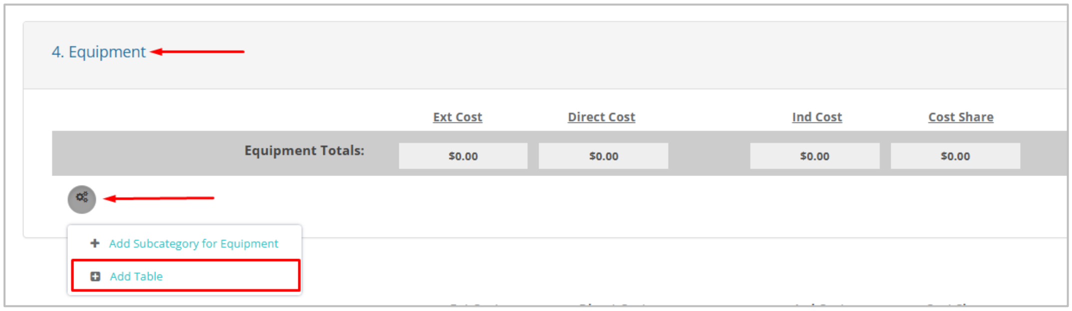


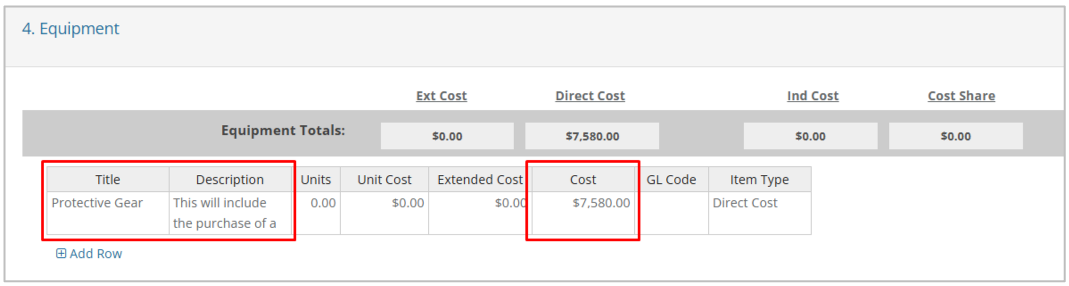
   b. In the worksheet, click on any applicable budget category (hyperlinked in blue) to enter costs.

   For budget worksheets with a pre-configured tables and line items, simply enter the costs into the "Cost" column.



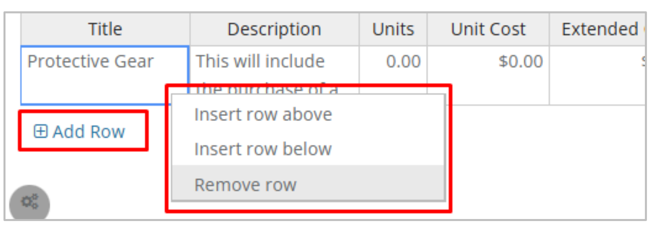
Alternatively, for budget worksheets with no prescribed line items, click the gear icon and “Add Table” to enter the title, description, and cost for each line item.



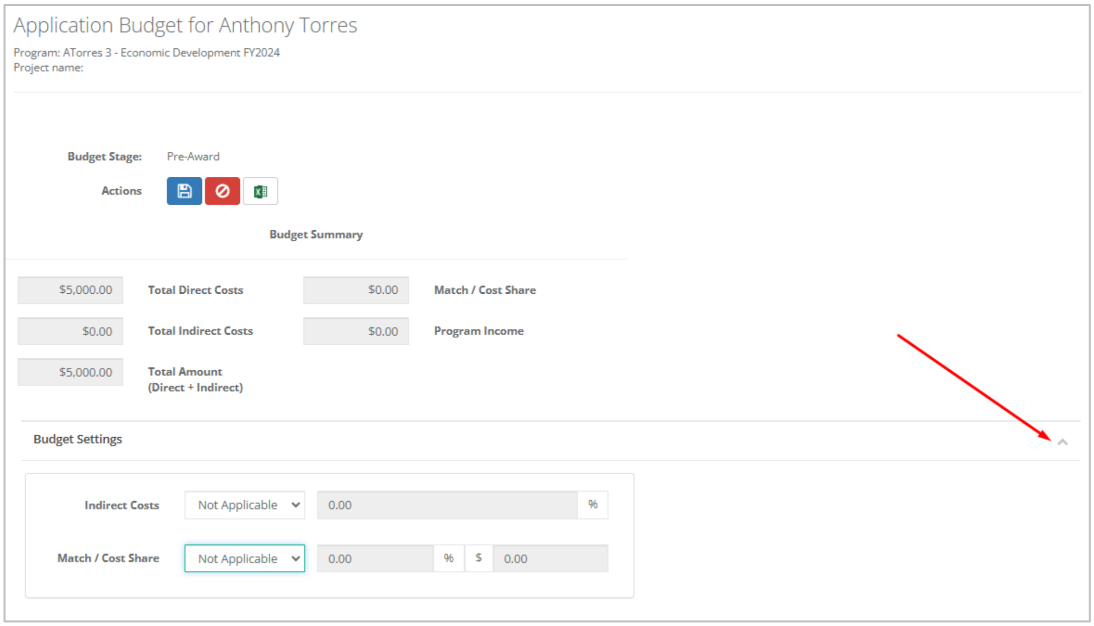


*Note: When needed, use the Units and Unit Cost fields to multiply those values into the “Extended Cost” field, which will copy into the “Cost” field. Remember to clear all four of these fields if you need to re-enter the calculation.

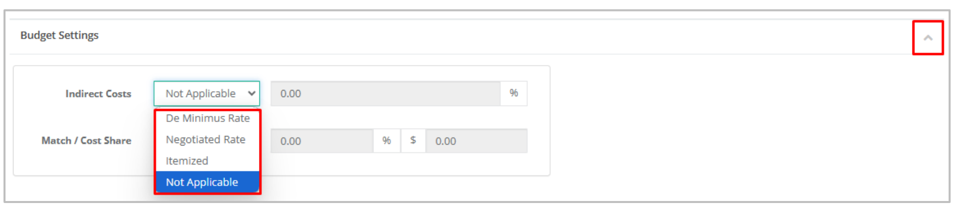
c. To add a row, click the “+ Add Row” button below that table.
To remove or insert rows above/below, right-click anywhere on the desired row and select an option.



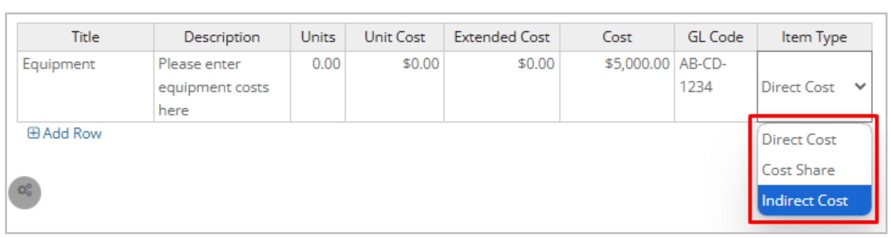
d. Budget Settings: Expand the Budget Settings at the top of the page to select a different method of calculating Indirect Costs and Match/Cost Share. You will see these amounts separated in the Budget Summary section at the top of the worksheet.



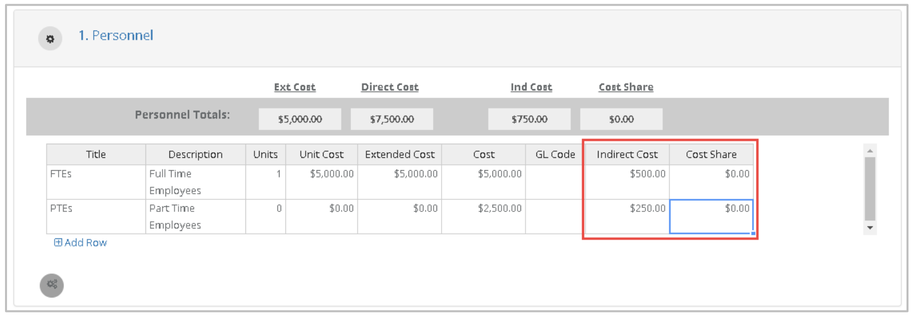
i. Indirect Cost — Methods for entering Indirect Cost include:



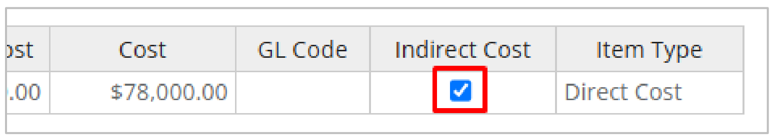
1. Not Applicable (Default Setting) — List all indirect costs as line items and update the “Item Type” on those line items to “Indirect Cost”



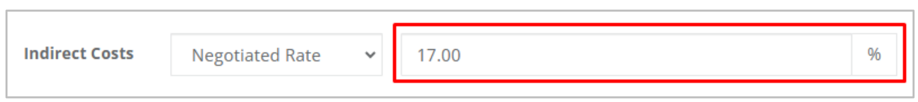
2. Itemized — Include an indirect cost value next to the Cost of any line item

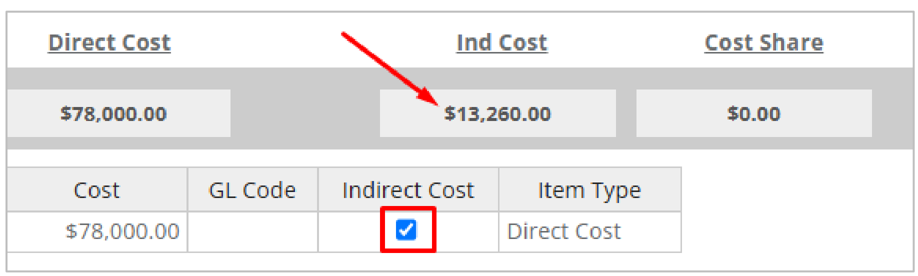


3. De Minimus Rate — Calculates the federal De Minimus indirect cost rate against each budget line where you select the Indirect Cost checkbox

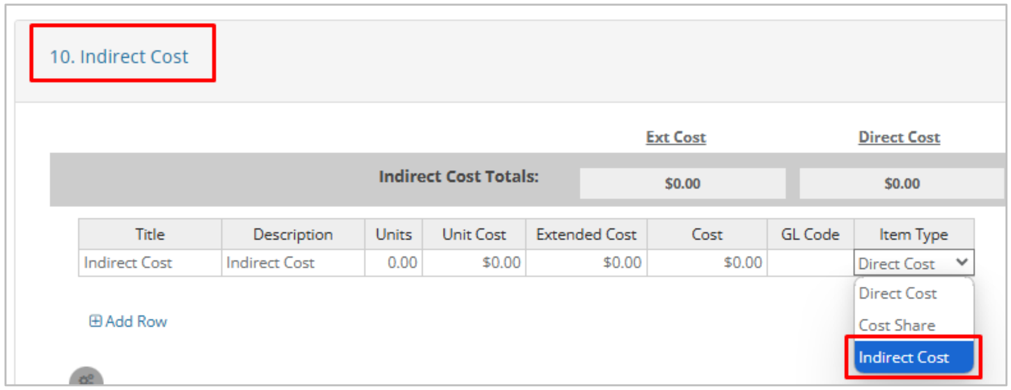


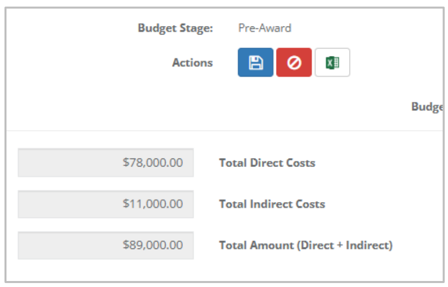
4. Negotiated Rate — Calculates the manually entered indirect cost rate against each budget line where you select the Indirect Cost checkbox



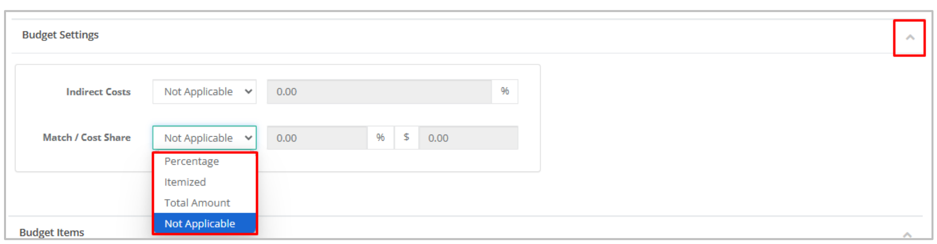


*__Note:__ Some budget worksheets may include a separate budget category dedicated to tracking Indirect Costs. Changing the rows' item types within this category to "Indirect Cost" will allow you to separate Direct Cost and Indirect Cost Totals at the top of the budget worksheet

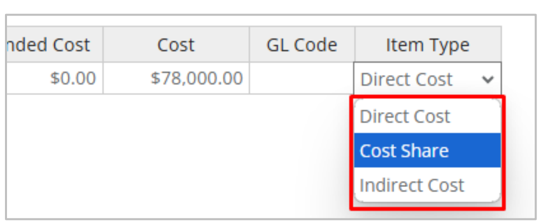




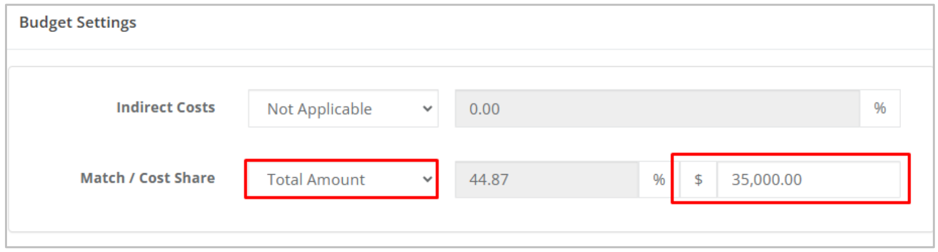
ii. Match/Cost Share — Methods for entering Match/Cost Share include:



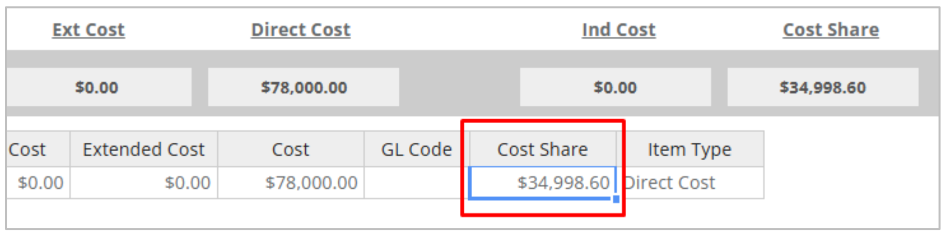
1. Not Applicable (Default Setting) — List all match costs as line items and update the "Item Type" on those line items to "Cost Share"



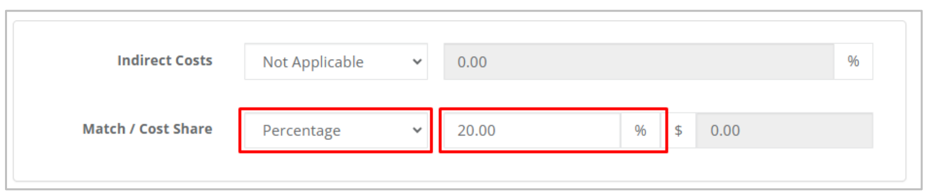
2. Total Amount — Enter a total match/cost share amount at the top of the Budget Worksheet

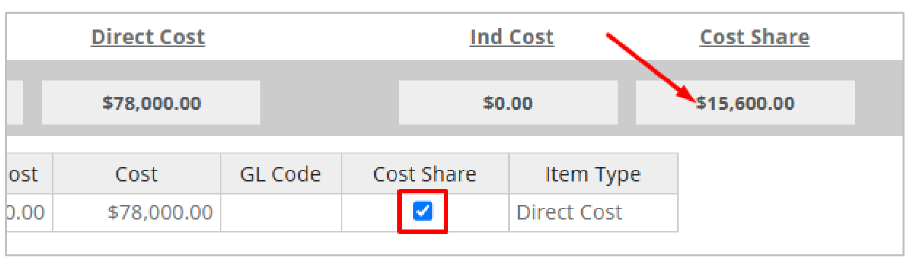


3. Itemized — Include a match/cost share value next to the Direct Cost of any line item

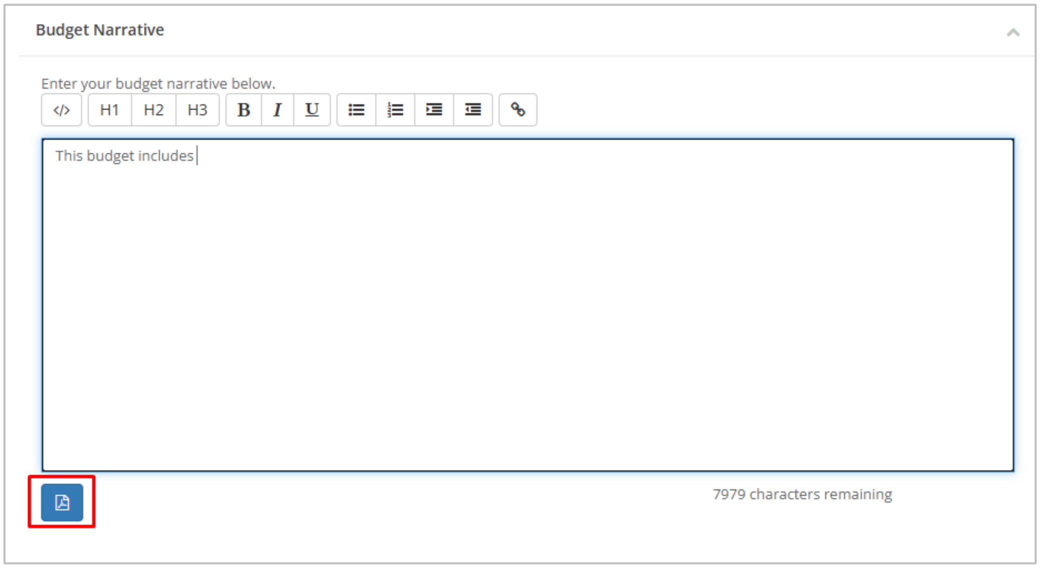


4. Percentage — Calculates the manually entered percentage against each budget line where you select the Cost Share checkbox

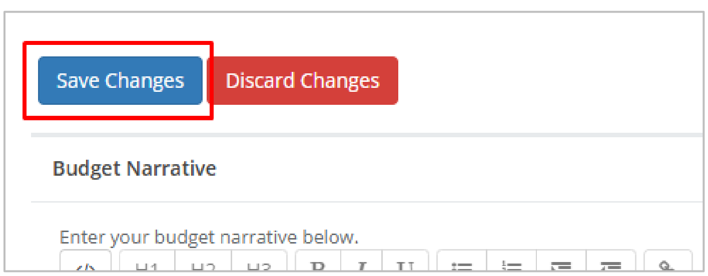


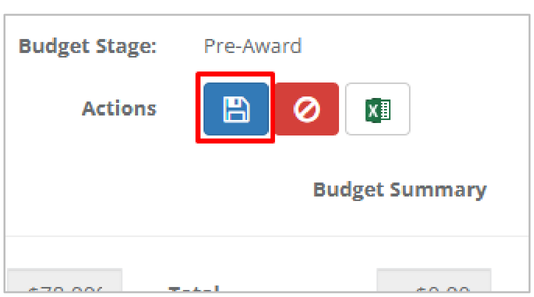


e. Budget Narrative (Optional): Unless directed to provide this information elsewhere, you may provide a detailed justification for your proposed budget here. This can also be exported to PDF for your records

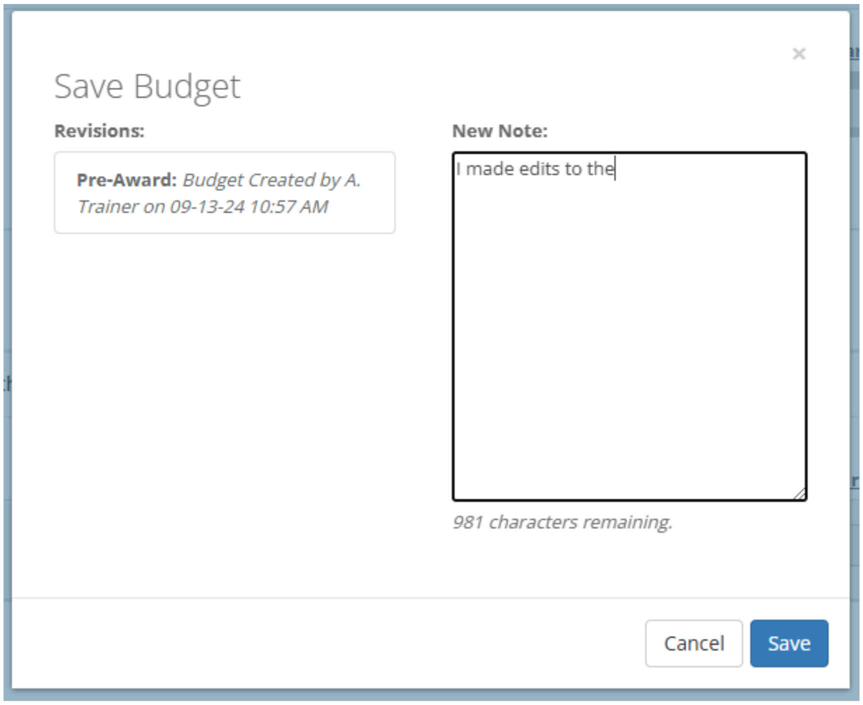


f. When finished editing the budget worksheet, click the “Save Changes” button (bottom of the worksheet) or the floppy disk icon (top of the worksheet) and input any relevant notes





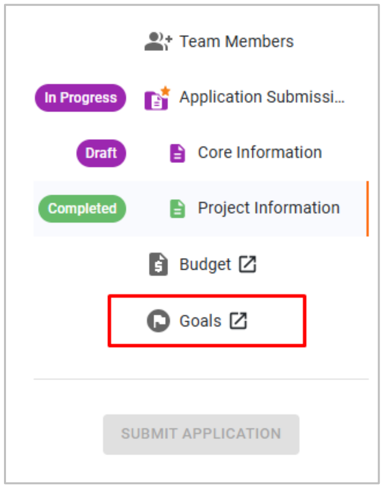
g. Any notes an applicant adds will be timestamped and logged in the “Revisions” history to the left of this popup. This history is visible to both your applicant team members and the granting agency reviewing this budget.



h. When finished editing and saving the worksheet, close the browser tab containing the budget and return to the previous tab containing the application

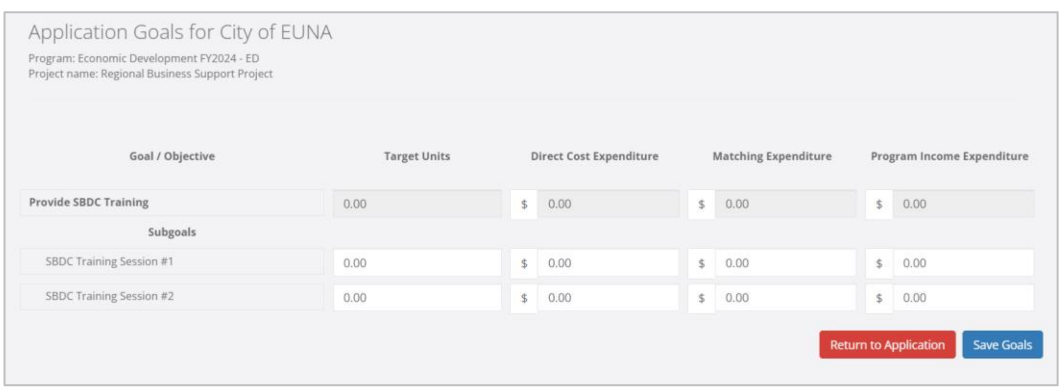
5. **Goals:** If included, fill the Goals Worksheet to propose project goals. This same form will be used later, if awarded, to document the final goal target amounts and to report progress against those goals.

    a. Click "Goals" from the left-hand bar. The Budget Worksheet will open in a separate browser tab.



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

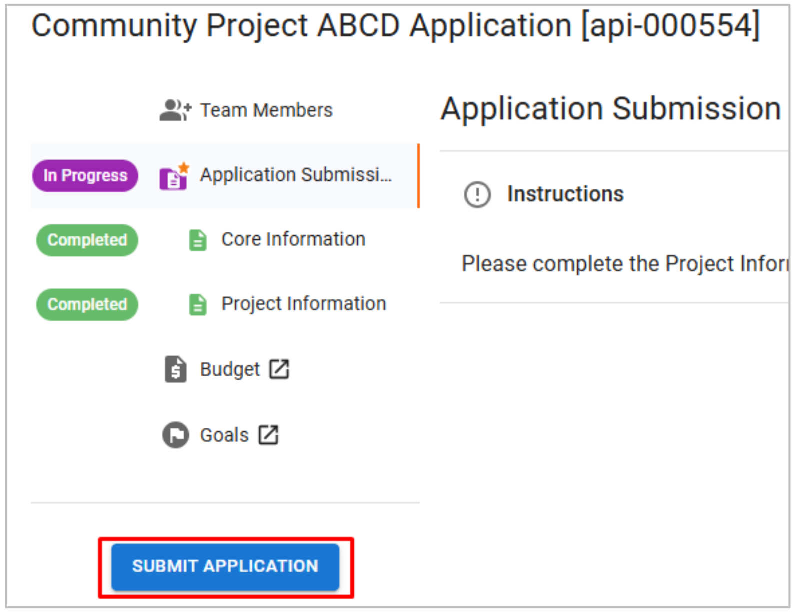
    ***Note:** The expenditure fields are not used during application but may be used when submitting Activity Reports if you are awarded.



    c. When finished editing, click Save Goals

    d. Close the browser tab containing the goals 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 "Submit Application" from the left-hand panel

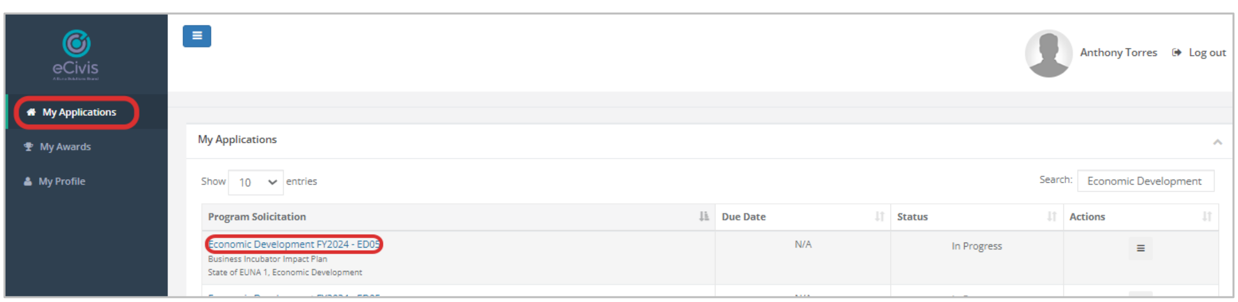


7. Once submitted, the Grantor will typically allow assigned Review Committee members to access select portions of your application content.

Tracking Current & Submitted Applications

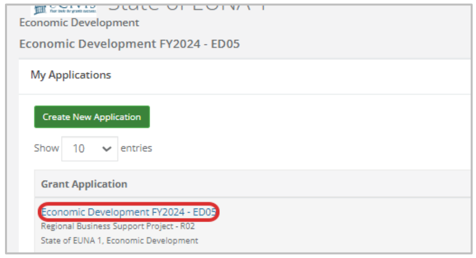
To view and monitor your open or previously submitted applications, follow the steps below:

1. Click "My Applications" from the left-hand navigation bar. Then, use the top-right search bar or sort the headings of this table to find your application.

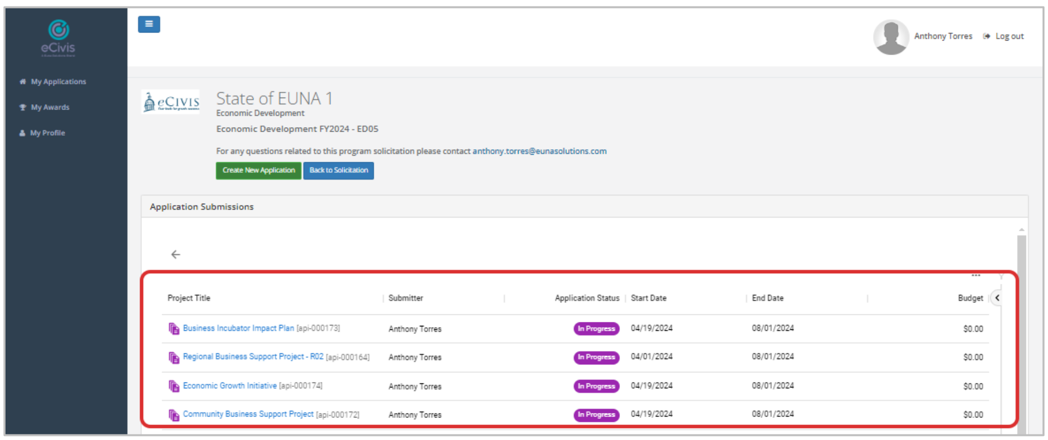


2. You will be taken to a table of all applications you've created for this Program (ability to submit multiple applications is only available at Grantor discretion and may be deactivated)

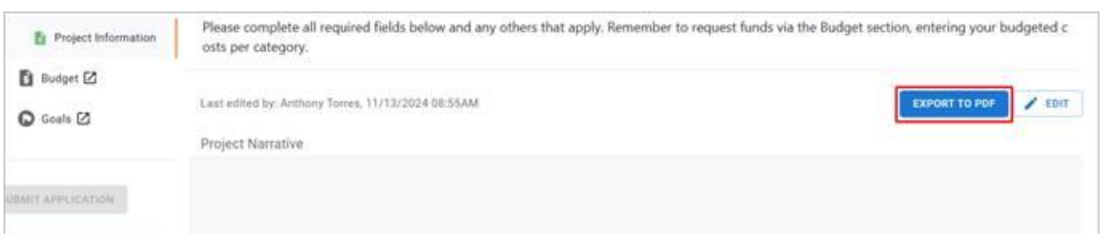
3. Click any of the linked application titles in this table to access the Application Submissions window.



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



5. To export a copy of the filled application form to PDF format, open the form name and click “Export to PDF” from the top-right corner of the page



6. To export a copy of the budget worksheet, open the “Budget” menu item and click the spreadsheet button at the top of the worksheet