

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):

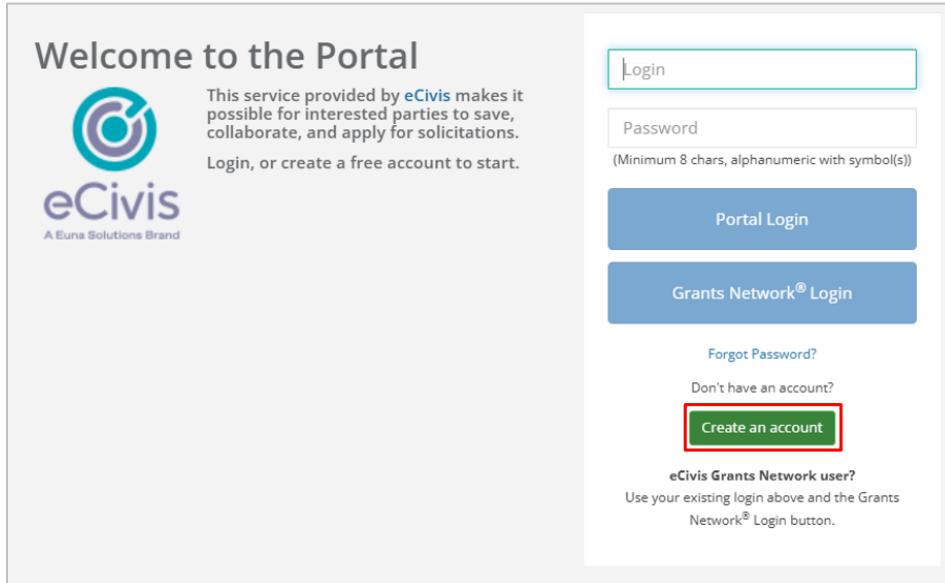
Economic Development Support (FY2023)												
Overview	Eligibility	Financial	Contact	Files								
<table border="1"> <tr> <td>Agency/Department:</td> <td>Administration</td> </tr> <tr> <td>Contact/Help:</td> <td>programcontact@countyofeuna.com</td> </tr> <tr> <td>Office:</td> <td>Office of SB</td> </tr> <tr> <td>Program Contact:</td> <td>123 Main St Nashville, TN 37211</td> </tr> </table>				Agency/Department:	Administration	Contact/Help:	programcontact@countyofeuna.com	Office:	Office of SB	Program Contact:	123 Main St Nashville, TN 37211	<p>Contact Notes:</p> <p>Questions should be directed to the appropriate program contact. The agency address provided is <u>for reference purposes only</u>.</p>
Agency/Department:	Administration											
Contact/Help:	programcontact@countyofeuna.com											
Office:	Office of SB											
Program Contact:	123 Main St Nashville, TN 37211											

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”



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

Portal Login

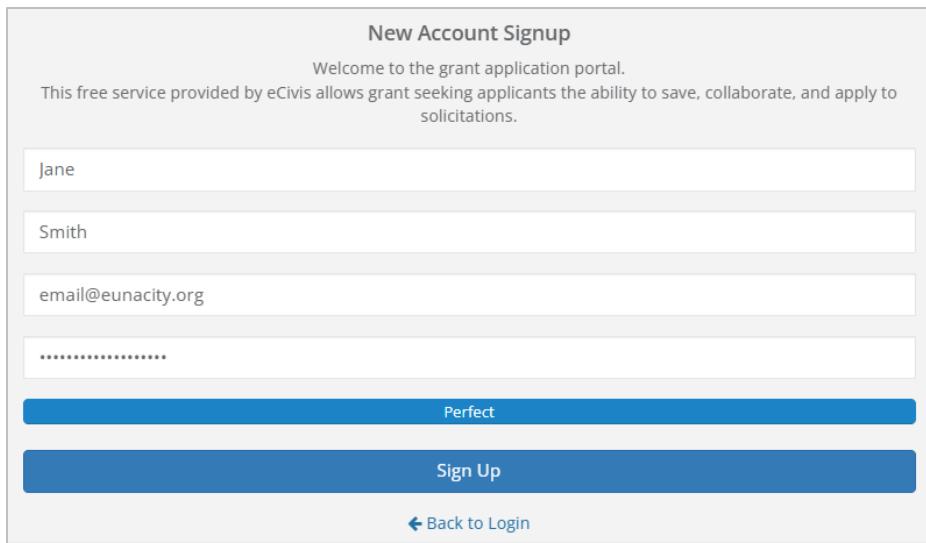
Grants Network® Login

[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 “Sign Up”



New Account Signup

Welcome to the grant application portal.

This free service provided by eCivis allows grant seeking applicants the ability to save, collaborate, and apply to solicitations.

Jane

Smith

email@email.com

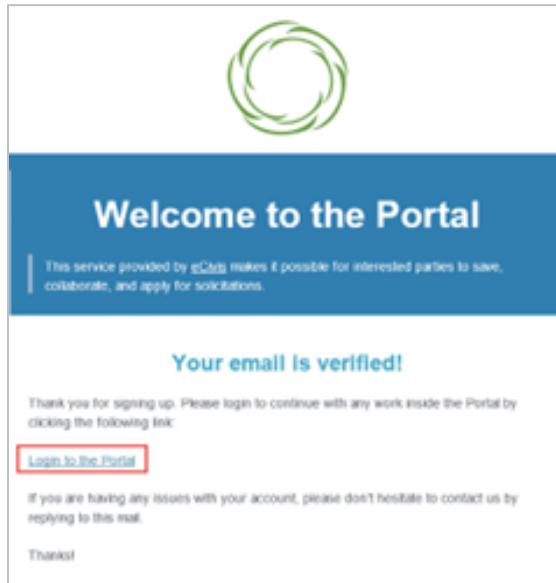
Perfect

Sign Up

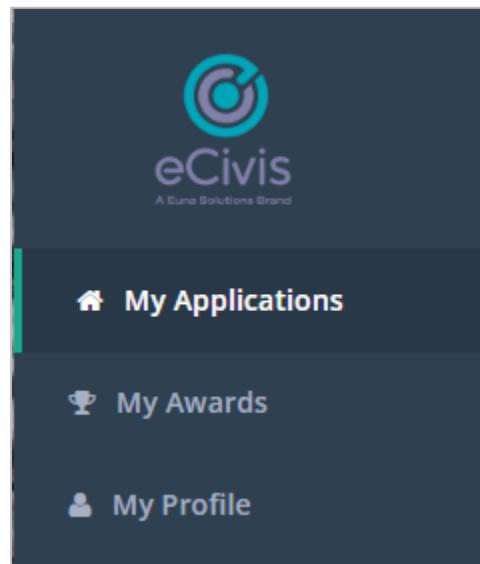
[← Back to Login](#)

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.



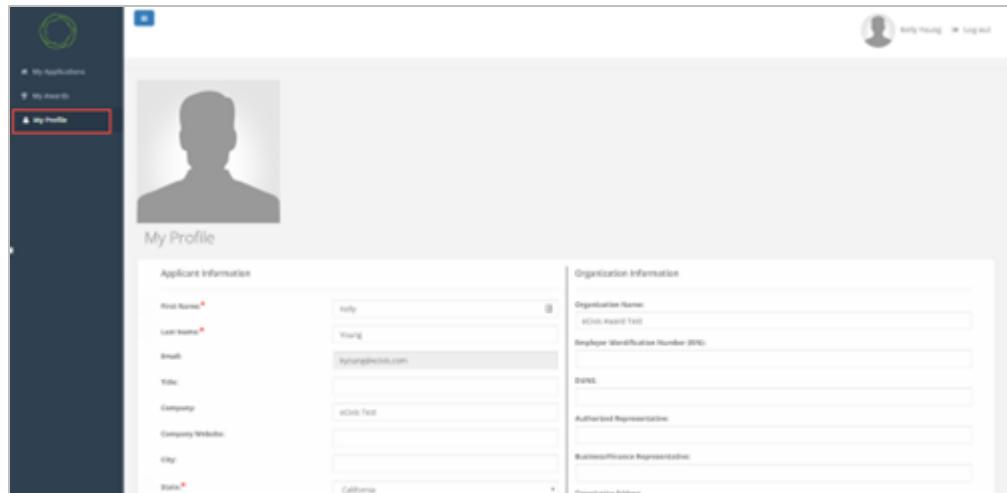
2. When you log into Portal, you will see a navigation bar on the left of your screen:



- 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.

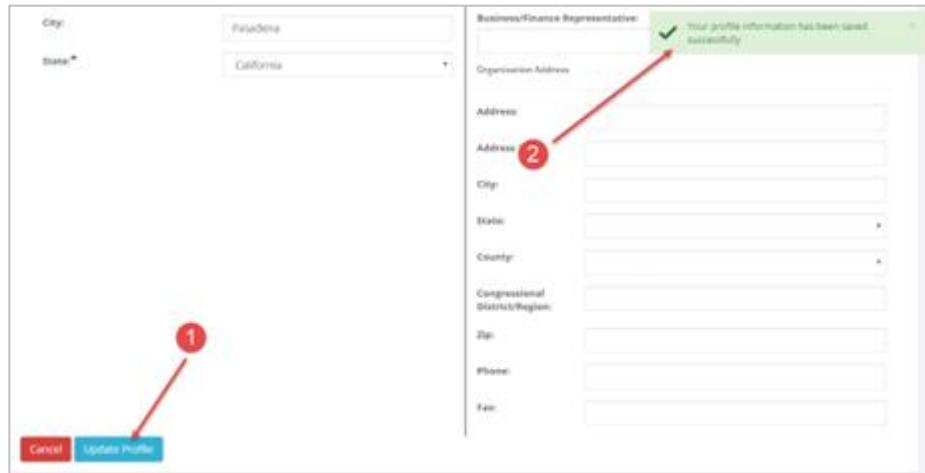
3. Setting up your account profile information in “My Profile”

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



The screenshot shows the 'My Profile' page in the eCivis portal. The left sidebar has three tabs: 'My Applications', 'My Awards', and 'My Profile' (which is highlighted with a red box). The main content area has two sections: 'Applicant Information' and 'Organization Information'. Under 'Applicant Information', fields include First Name (Kathy), Last Name (Young), Email (kyoung@eCivis.com), Title (Public Test), Company (eCivis Test), Company Website, City, State (California). Under 'Organization Information', fields include Organization Name (eCivis Test Test), Employee Identification Number (EIN), DUNS, Authorized Representative, Business/Finance Representative, and Organization Address.

- 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:



The screenshot shows a confirmation message: "Your profile information has been saved successfully." with a checkmark icon. A red arrow points from the 'Update Profile' button at the bottom left to this message. The background shows a form with fields for City (Pasadena), State (California), and Business/Finance Representative information.

- 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.

State of EUNA 1

Economic Development FY2024 - ED04

Apply

Overview	Eligibility	Financial	Contact	Files
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> ID: ED-2345-6789 </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> Title: Economic Development FY2024 - ED04 </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> Application Start Date: 04/01/2024 </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> Application End Date: 07/31/2024 </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> CFDA/ALN: 12.345 </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> Reference URL: https://eunasolutions.com/ </div>				
Summary: <small>Economic Development FY2024 - ED04 will provide small businesses with funding to support economic growth in Euna City through business coaching, training programs, and informational resources.</small>				

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

Starting a New Application

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

State of EUNA 1

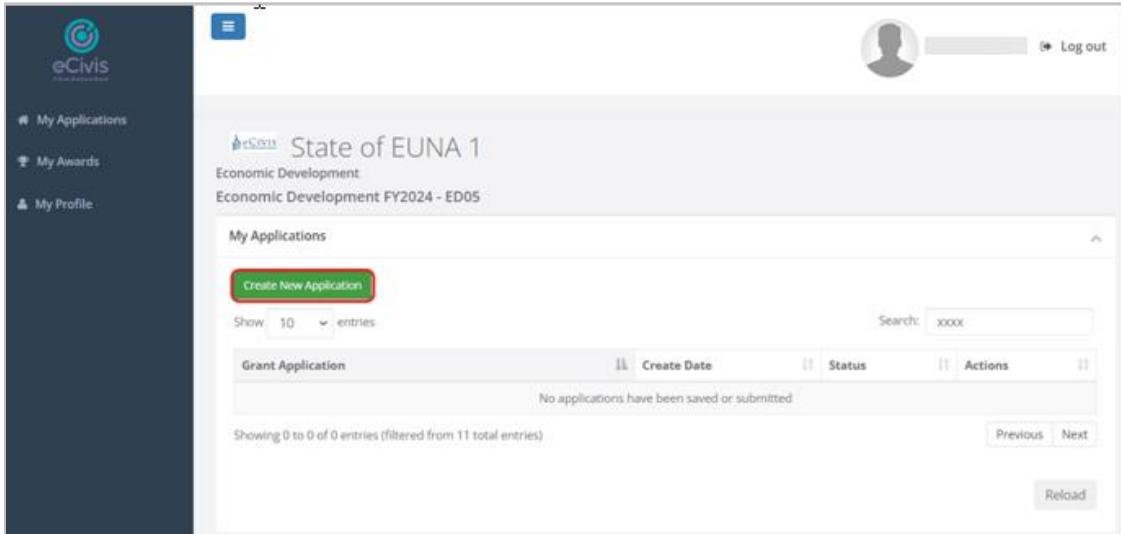
Economic Development FY2024 - ED05

Apply

Overview	Eligibility	Financial	Contact	Files
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2. Log into your Portal account using the instructions from the “Creating an Account” chapter above

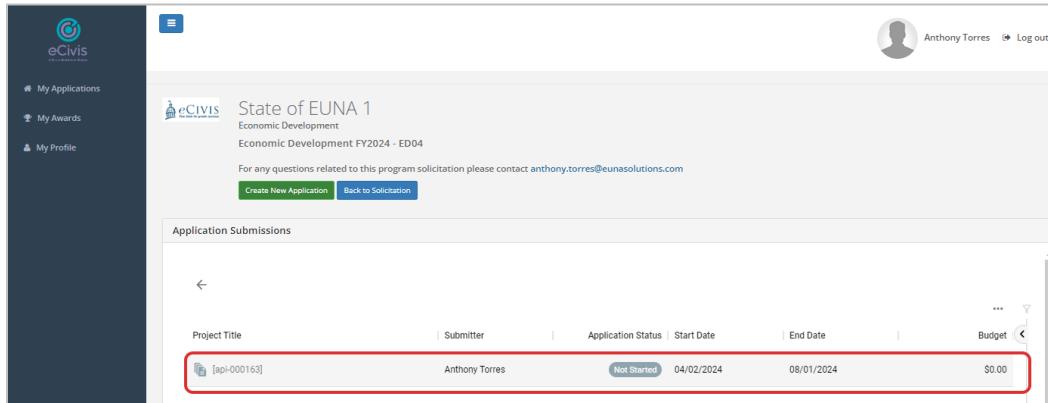
3. Click “Create New Application”



The screenshot shows the eCivis application interface for the "State of EUNA 1" program under "Economic Development". The left sidebar has links for "My Applications", "My Awards", and "My Profile". The main content area displays the program details and a table titled "Grant Application" with a single row: "No applications have been saved or submitted". A green "Create New Application" button is visible above the table. The table includes columns for "Grant Application", "Create Date", "Status", and "Actions".

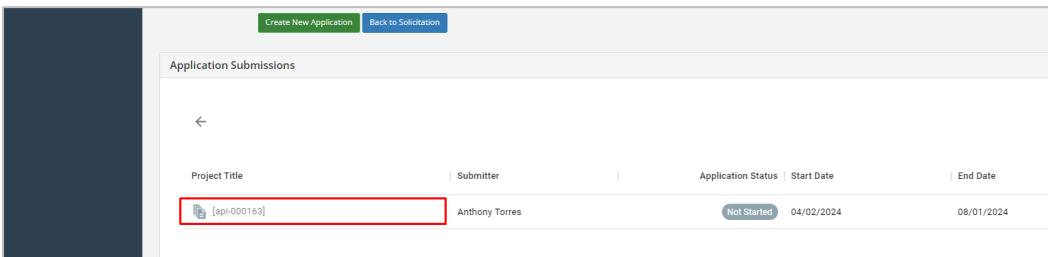
4. The new application will appear in the Application Submissions table.

***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.



The screenshot shows the "Application Submissions" table after a new application has been created. The table includes columns for "Project Title", "Submitter", "Application Status", "Start Date", "End Date", and "Budget". The first row shows a project titled "[api-000163]" submitted by "Anthony Torres" with a status of "Not Started", start date of "04/02/2024", end date of "08/01/2024", and a budget of "\$0.00". The entire row for this application is highlighted with a red border.

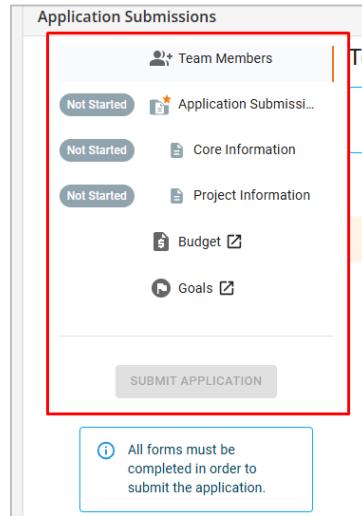
5. Click on the newly added Project Title (labeled with a unique code beginning with “api-“)



This screenshot is identical to the previous one, showing the "Application Submissions" table with the newly created application highlighted. The project title "[api-000163]" is selected, indicated by a red border around the entire row.

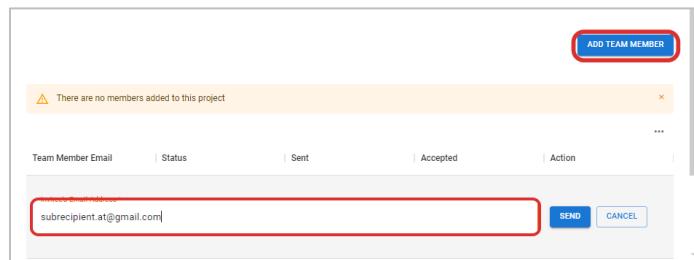
Completing and Submitting an Application

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



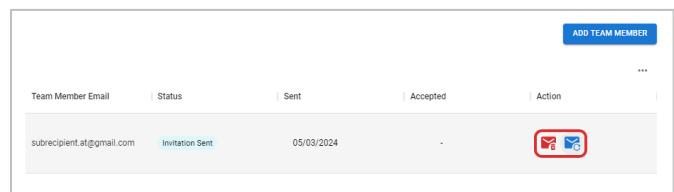
1. **Team Members:** Add Team members if you would like to invite other individuals to collaborate on this application.

- a. Click “Add Team Member”



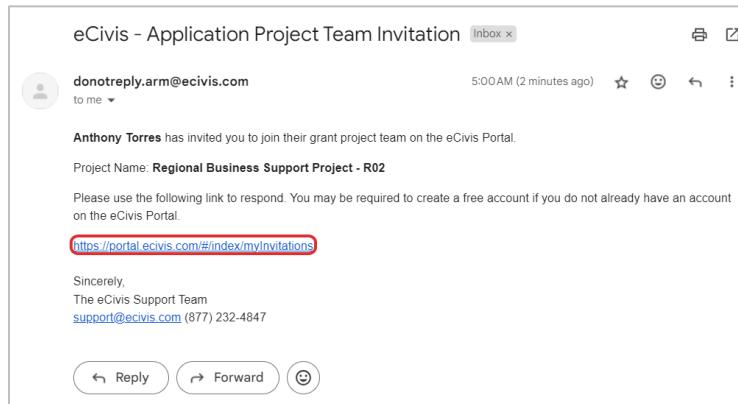
- b. Enter the invitee’s Email Address and click “Send”
- c. Project Team Members invitations will be sent and be listed in the status as “Invitation Sent”.

***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.

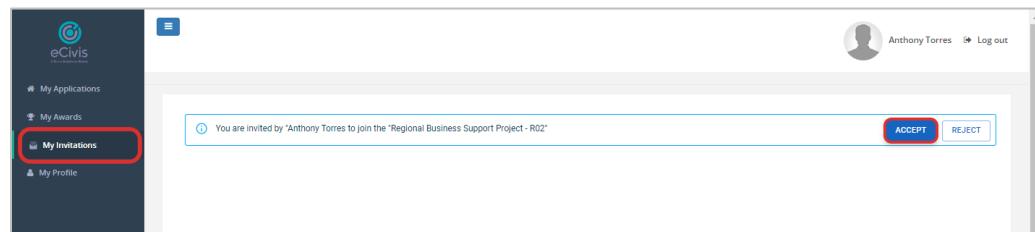


- d. The invitee will receive an email to access eCivis Portal and accept the invitation.

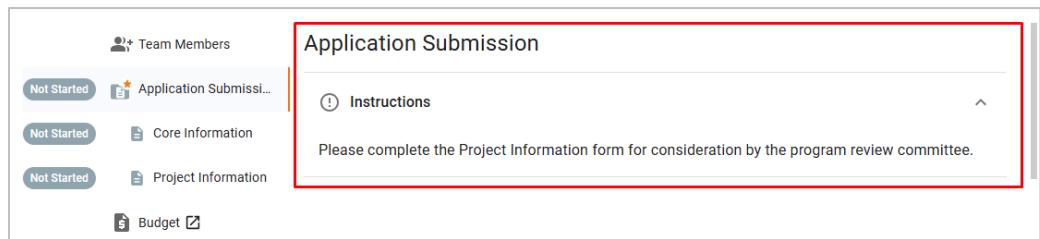
***Note:** In order to respond and accept the invite, the invitee must set up a Portal account if they have not already done so



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



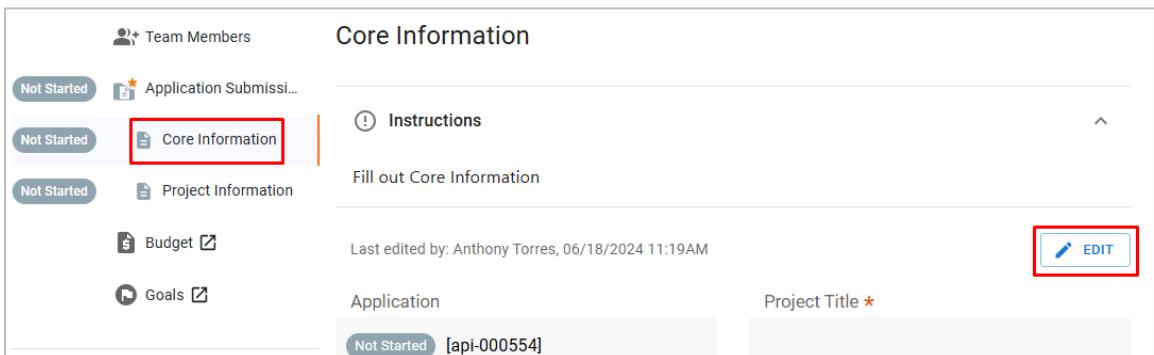
2. **Submission Stage:** The starred folder icon  indicates the current Submission Stage to be completed
 - a. Open this section to view the title and instructions for this Submission Stage



The screenshot shows the 'Application Submission' page. On the left, there's a sidebar with 'Team Members' and four items labeled 'Not Started': 'Application Submission' (with a star icon), 'Core Information', 'Project Information', and 'Budget'. The 'Core Information' item is highlighted with a red box. The main area is titled 'Application Submission' and contains a section titled 'Instructions' with the sub-section 'Project Information' expanded. It says: 'Please complete the Project Information form for consideration by the program review committee.'

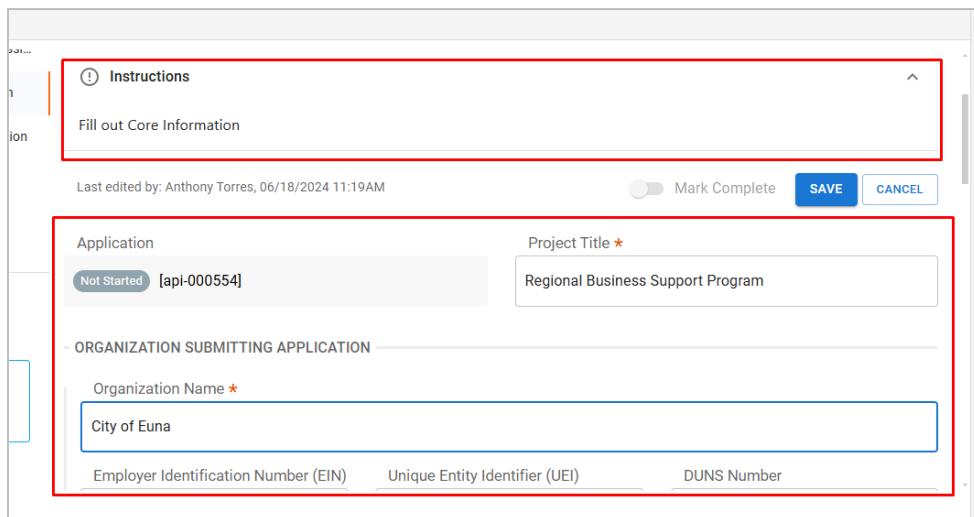
3. **Application Forms:** Open and edit each form until complete

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



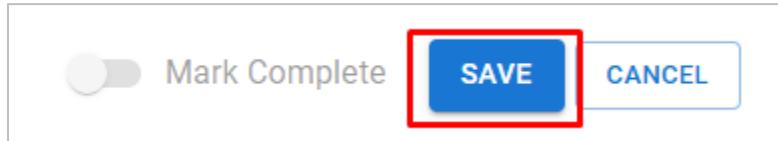
The screenshot shows the 'Core Information' form page. The left sidebar has 'Team Members' and three items labeled 'Not Started': 'Core Information' (highlighted with a red box), 'Project Information', and 'Budget'. Below the sidebar, there's an 'Application' section with a 'Not Started' status and the identifier '[api-000554]'. To the right, there's a 'Project Title' field with the value 'Regional Business Support Program'. At the bottom right of the main area is a blue 'EDIT' button with a red box around it.

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

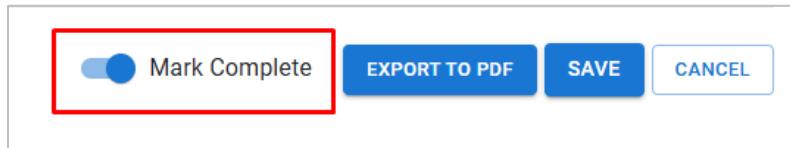


The screenshot shows the 'Core Information' form page. The top section 'Instructions' is highlighted with a red box. Below it, the 'Fill out Core Information' section is also highlighted with a red box. At the bottom, the 'ORGANIZATION SUBMITTING APPLICATION' section is highlighted with a red box. This section includes fields for 'Organization Name' (with 'City of Euna' entered) and 'Employer Identification Number (EIN)', 'Unique Entity Identifier (UEI)', and 'DUNS Number'.

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

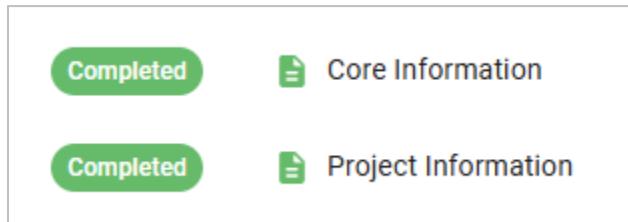


- d. Click “Mark Complete” when you have finalized all edits. Toggle this field back to the “off” position if you need to make further edits before submitting.

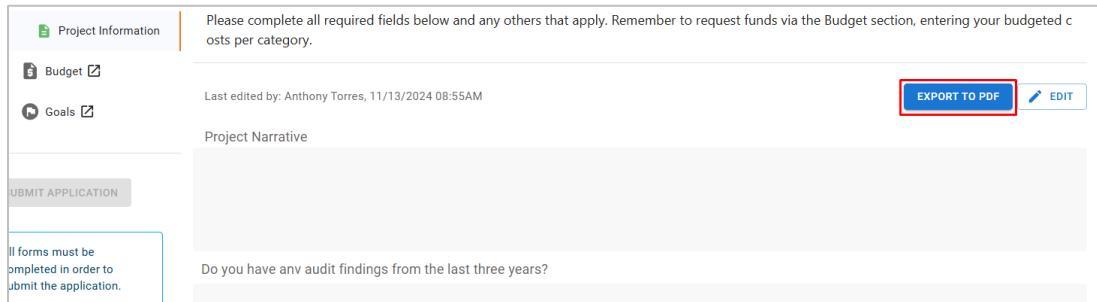


- e. Any forms you mark complete will update to the green “Completed” status

***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



Please complete all required fields below and any others that apply. Remember to request funds via the Budget section, entering your budgeted costs per category.

Last edited by: Anthony Torres, 11/13/2024 08:55AM

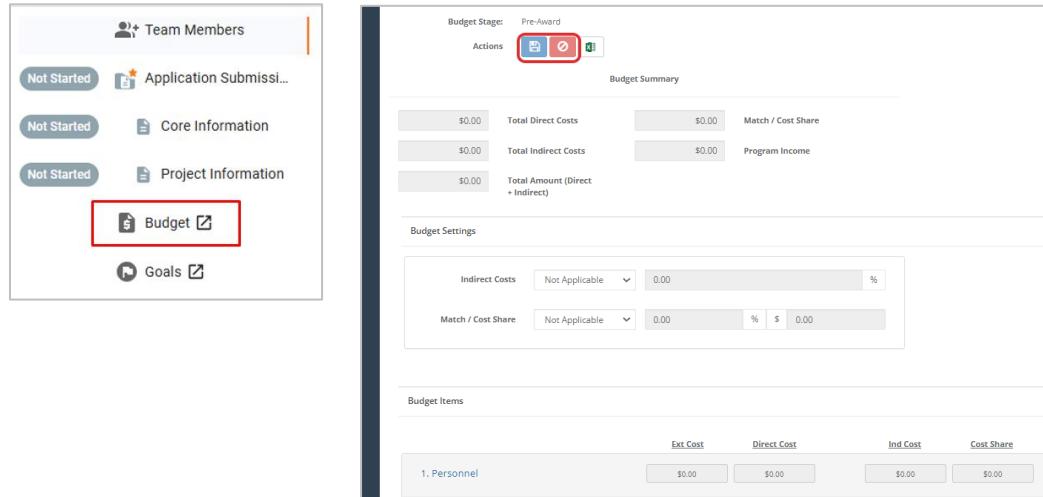
Project Narrative

Do you have any audit findings from the last three years?

If forms must be completed in order to submit the application.

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.

4. Equipment						
		Ext Cost	Direct Cost	Ind Cost	Cost Share	
Equipment Totals:		\$0.00	\$5,000.00	\$0.00	\$0.00	
Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code
Equipment	Please enter equipment costs here	0.00	\$0.00	\$0.00	5000	AB-CD-1234
Add Row 						

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.

4. Equipment

	Ext Cost	Direct Cost	Ind Cost	Cost Share
Equipment Totals:	\$0.00	\$0.00	\$0.00	\$0.00
				
+ Add Subcategory for Equipment				
 Add Table				

4. Equipment

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

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

- 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.

Title	Description	Units	Unit Cost	Extended Cost
Protective Gear	This will include the purchase of a	0.00	\$0.00	\$0.00
 Add Row	<div style="border: 1px solid red; padding: 5px;">  Insert row above  Insert row below  Remove row </div>			

- 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.

Application Budget for Anthony Torres

Program: ATorres 3 - Economic Development FY2024
Project name:

Budget Stage: Pre-Award

Actions:   

Budget Summary

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

Budget Settings

Indirect Costs	Not Applicable	0.00	%
Match / Cost Share	Not Applicable	0.00	%



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

Budget Settings

Indirect Costs	Not Applicable	0.00	%
Match / Cost Share	De Minimus Rate Negotiated Rate Itemized	0.00	%

Not Applicable

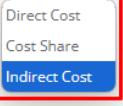


1. Not Applicable (Default Setting) — List all indirect costs as line items and update the “Item Type” on those line items to “Indirect Cost”

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

Add Row

Indirect Cost



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

1. Personnel							
		Ext Cost	Direct Cost	Ind Cost	Cost Share		
Personnel Totals:		\$5,000.00	\$7,500.00	\$750.00	\$0.00		
Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Indirect Cost Cost Share
FTEs	Full Time Employees	1	\$5,000.00	\$5,000.00	\$5,000.00		\$500.00 \$0.00
PTEs	Part Time Employees	0	\$0.00	\$0.00	\$2,500.00		\$250.00 \$0.00

[Add Row](#)

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

Cost	Cost	GL Code	Indirect Cost	Item Type
.00	\$78,000.00		<input checked="" type="checkbox"/>	Direct Cost

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

Indirect Costs	Negotiated Rate	17.00	%						
<table border="1"> <thead> <tr> <th>Direct Cost</th> <th>Ind Cost</th> <th>Cost Share</th> </tr> </thead> <tbody> <tr> <td>\$78,000.00</td> <td>\$13,260.00</td> <td>\$0.00</td> </tr> </tbody> </table>				Direct Cost	Ind Cost	Cost Share	\$78,000.00	\$13,260.00	\$0.00
Direct Cost	Ind Cost	Cost Share							
\$78,000.00	\$13,260.00	\$0.00							
Cost	GL Code	Indirect Cost	Item Type						
\$78,000.00		<input checked="" type="checkbox"/>	Direct Cost						

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

10. Indirect Cost							
				Ext Cost	Direct Cost		
Indirect Cost Totals:				\$0.00	\$0.00		
Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Item Type
Indirect Cost	Indirect Cost	0.00	\$0.00	\$0.00	\$0.00		Direct Cost
<input type="button" value="Add Row"/> <input type="button" value="Delete Row"/> <input type="button" value="Edit Row"/>							
<input type="button" value="Print"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/>							

Budget Stage: Pre-Award	
Actions	
\$78,000.00	Total Direct Costs
\$11,000.00	Total Indirect Costs
\$89,000.00	Total Amount (Direct + Indirect)

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

Budget Settings			
Indirect Costs	Not Applicable	0.00	%
Match / Cost Share	Not Applicable	0.00	% \$ 0.00
	Percentage		
	Itemized		
	Total Amount		
Budget Items	Not Applicable		

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

Budgeted Cost	Cost	GL Code	Item Type
\$0.00	\$78,000.00		Direct Cost
			Direct Cost Cost Share Indirect Cost

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

Budget Settings				
Indirect Costs	Not Applicable	0.00	%	
Match / Cost Share	Total Amount	44.87	%	\$ 35,000.00

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

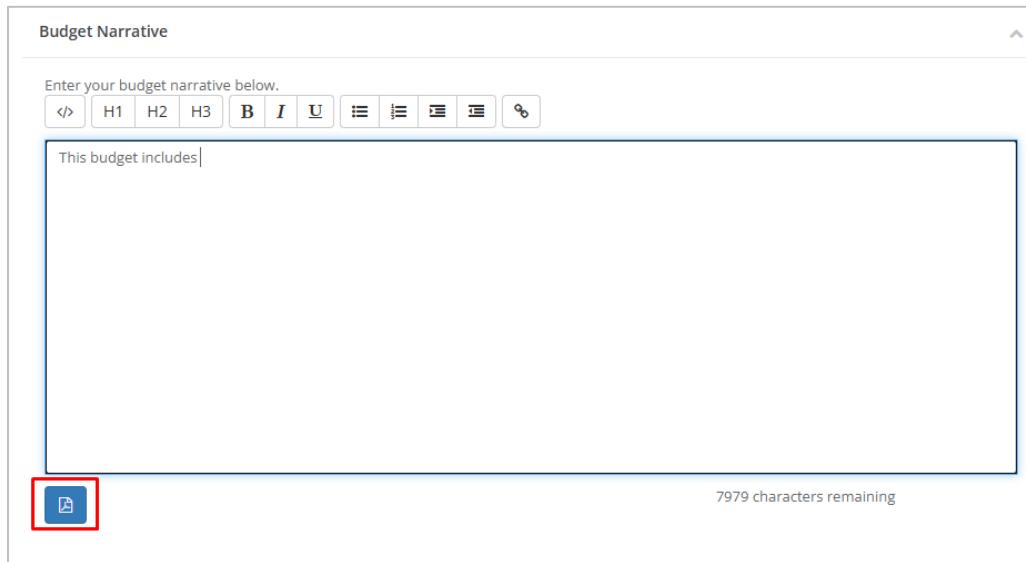
<u>Ext Cost</u>	<u>Direct Cost</u>	<u>Ind Cost</u>	<u>Cost Share</u>
\$0.00	\$78,000.00	\$0.00	\$34,998.60
Cost	Extended Cost	Cost	GL Code
\$0.00	\$0.00	\$78,000.00	Cost Share \$34,998.60
			Item Type Direct Cost

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

Budget Settings				
Indirect Costs	Not Applicable	0.00	%	
Match / Cost Share	Percentage	20.00	%	\$ 0.00

<u>Direct Cost</u>		<u>Ind Cost</u>	<u>Cost Share</u>
\$78,000.00	\$0.00	\$15,600.00	
Cost	Cost	GL Code	Cost Share
\$0.00	\$78,000.00		<input checked="" type="checkbox"/>
			Item Type Direct Cost

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



Budget Narrative

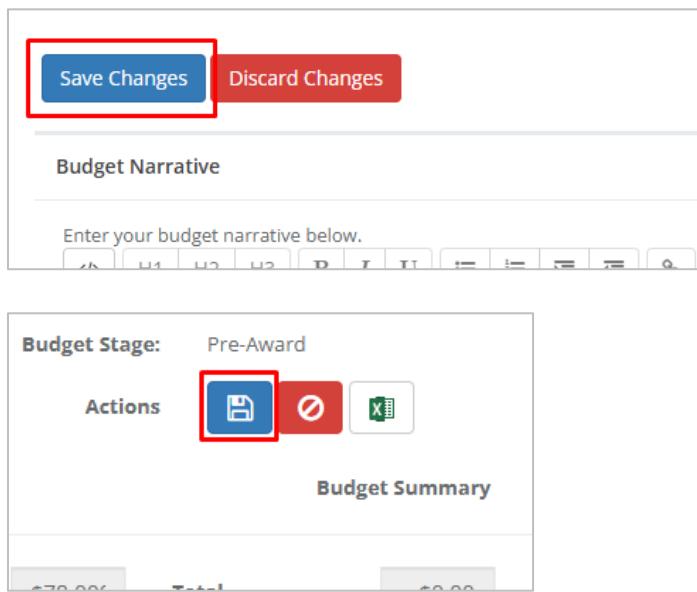
Enter your budget narrative below.

This budget includes|

Save Changes Discard Changes

7979 characters remaining

- 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



Save Changes Discard Changes

Budget Narrative

Enter your budget narrative below.

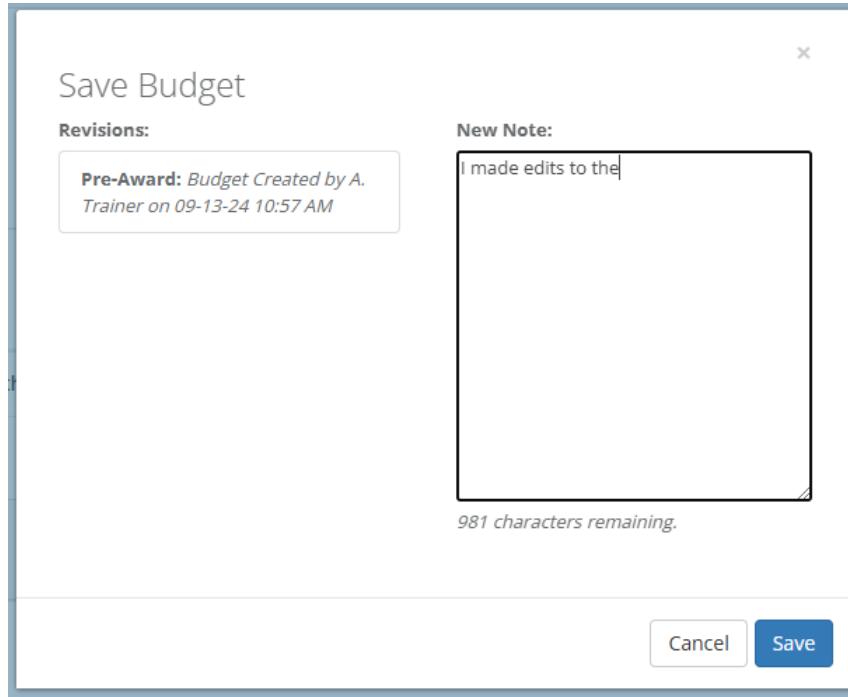
Budget Stage: Pre-Award

Actions Save Delete Excel

Budget Summary

\$70,000	Total	\$0.00
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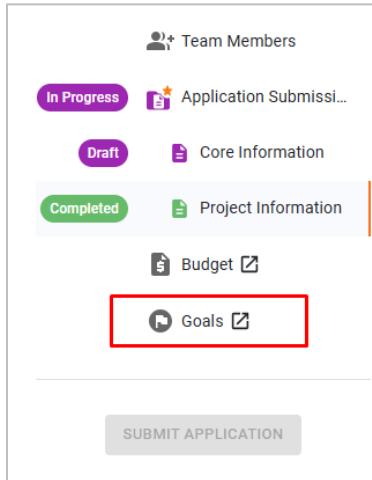
- g. Any notes an applicant adds will be timestamped and logged in the “Revisions” history to the left of this popup. This history is visible to both your applicant team members and the granting agency reviewing this budget.



- 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.

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



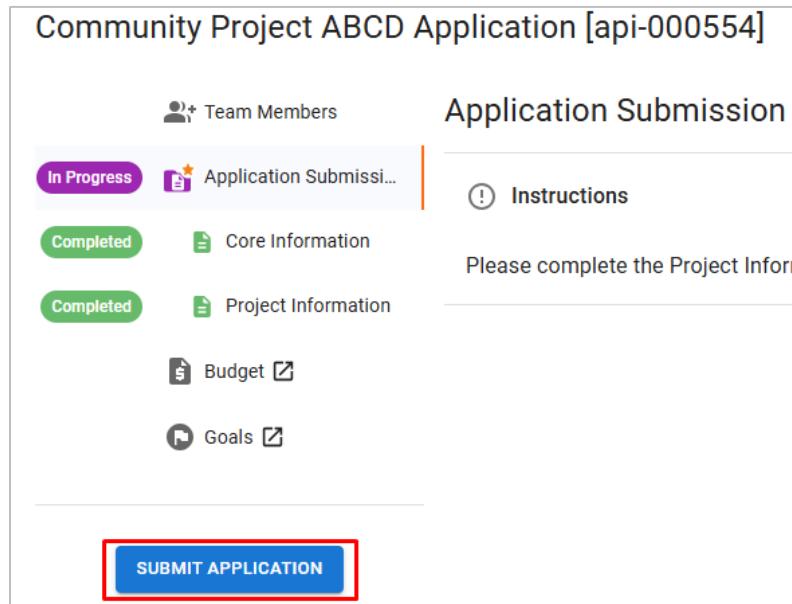
- Enter the target amounts for any applicable goal areas that your project will address

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

Application Goals for City of EUNA				
Program: Economic Development FY2024 - ED Project name: Regional Business Support Project				
Goal / Objective	Target Units	Direct Cost Expenditure	Matching Expenditure	Program Income Expenditure
Provide SBDC Training	0.00	\$ 0.00	\$ 0.00	\$ 0.00
Subgoals				
SBDC Training Session #1	0.00	\$ 0.00	\$ 0.00	\$ 0.00
SBDC Training Session #2	0.00	\$ 0.00	\$ 0.00	\$ 0.00
Return to Application Save Goals				

- When finished editing, click Save Goals
- 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



Community Project ABCD Application [api-000554]

Application Submission

Team Members

In Progress Application Submissi... **Instructions**
Completed Core Information
Completed Project Information

Budget Goals

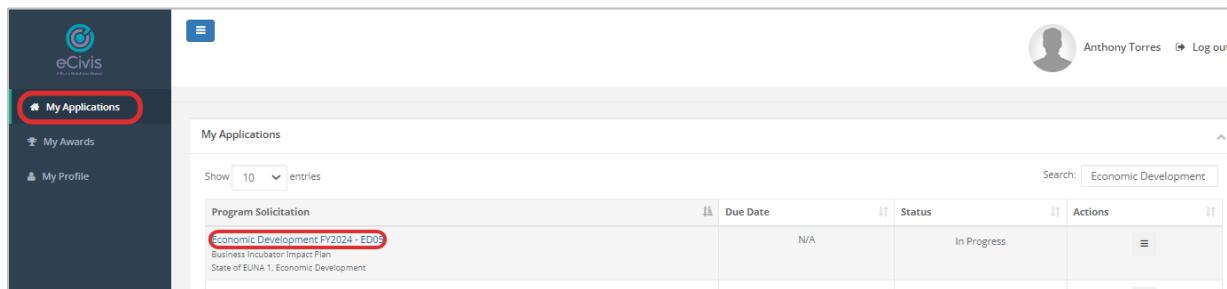
SUBMIT APPLICATION

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.

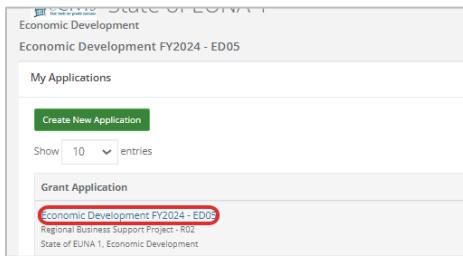


My Applications

Program Solicitation	Due Date	Status	Actions
Economic Development FY2024 - ED03 Business Incubator Impact Plan State of EUNA 1. Economic Development	N/A	In Progress	

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)

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



Economic Development
Economic Development FY2024 - ED05

My Applications

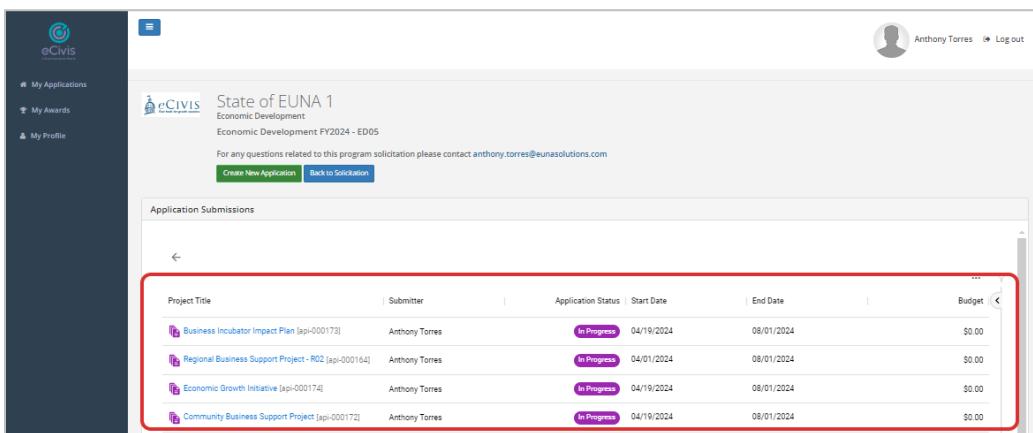
Create New Application

Show: 10 entries

Grant Application

Economic Development FY2024 - ED05
Regional Business Support Project - R02
State of EUNA 1, Economic Development

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



State of EUNA 1
Economic Development
Economic Development FY2024 - ED05

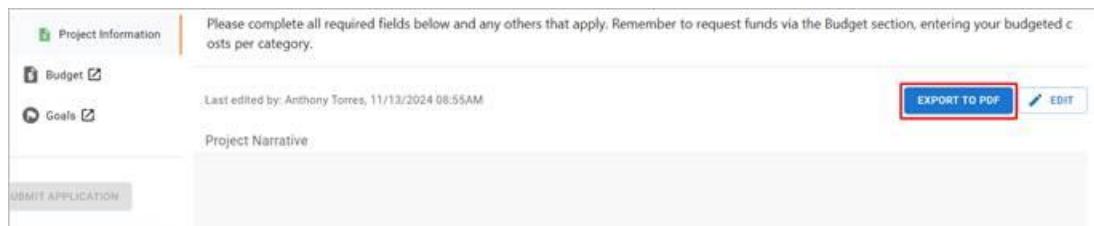
For any questions related to this program solicitation please contact anthony.torres@eunasolutions.com

Create New Application Back to Solicitation

Application Submissions

Project Title	Submitter	Application Status	Start Date	End Date	Budget
Business Incubator Impact Plan [api-000173]	Anthony Torres	In Progress	04/19/2024	08/01/2024	\$0.00
Regional Business Support Project - R02 [api-000164]	Anthony Torres	In Progress	04/01/2024	08/01/2024	\$0.00
Economic Growth Initiative [api-000174]	Anthony Torres	In Progress	04/19/2024	08/01/2024	\$0.00
Community Business Support Project [api-000172]	Anthony Torres	In Progress	04/19/2024	08/01/2024	\$0.00

- 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



Project Information

Please complete all required fields below and any others that apply. Remember to request funds via the Budget section, entering your budgeted costs per category.

Budget

Goals

Last edited by: Anthony Torres, 11/13/2024 08:55AM

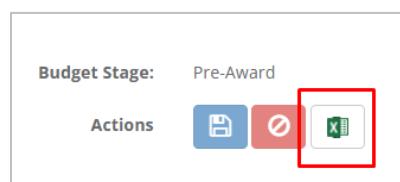
EXPORT TO PDF

EDIT

Project Narrative

SUBMIT APPLICATION

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



Budget Stage: Pre-Award

Actions

EXPORT TO PDF

Spreadsheet