



eCivis

PORTAL USER GUIDE
Pre-Award Grants Management
for Applicants

1. Logging into Your eCivis Portal Account

If you are applying to a program solicitation, you will need to have a Portal account at <https://portal.ecivis.com/#/login>.

NOTE: If you have an account for eCivis *Grants Network*, you can enter your eCivis username (typically your email) and password. Then, click on the eCivis Login button

If you are new to eCivis *Portal*, This free account is where you will create a user profile, manage all of your application submissions and if awarded, manage all of you post-award reporting:

The screenshot shows the 'Welcome to the Portal' login page. On the left, there is a green circular logo and text: '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.' The main form area contains a 'Login' field, a 'Password' field with a note '(Minimum 8 chars, alphanumeric with symbol(s))', and two buttons: 'Portal Login' (marked with a red '1') and 'eCivis Login' (marked with a red '2'). Below these are links for 'Forgot Password?' (marked with a red '3') and 'Don't have an account?' leading to a 'Create an account' button (marked with a red '4'). At the bottom, it asks 'eCivis Grants Network user?' and instructs to 'Use your existing login above and the eCivis Login button.'

1. **Portal Login:** for users who have a Portal account only.
2. **eCivis Login:** for users who have a Grants Network account. It will be the same username and password.
3. **Forgot Password?:** Reset your password by entering your email on the following window.
4. **Create an account:** for new users without a Portal account.

1.1. Creating an Account

1) Click on *Create an account* and you will see the following page:

New Account Signup

Welcome to the grant application portal. This free service provided by eCivis allows grant seeking applicants the ability to save, collaborate

First Name **1**

Last Name **2**

Email Address **3**

Password **4**

Weak

Sign Up **5**

[← Back to Login](#)

1. Enter your First Name.

2. Enter your Last Name.

3. Enter your Email Address.

4. Enter a Password.

5. Click the Sign Up button. This will send you a confirmation email. You will need to click on the Portal link within that confirmation email to activate your account:



Welcome to the Portal

This service provided by eCivis makes it possible for interested parties to save, collaborate, and apply for solicitations.

Your email is verified!

Thank you for signing up. Please login to continue with any work inside the Portal by clicking the following link:

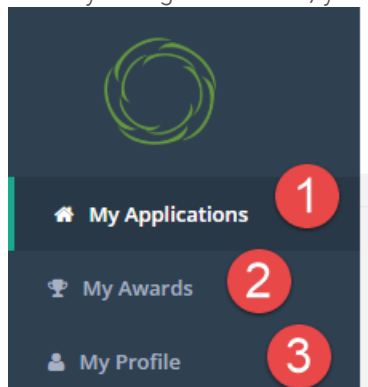
[Login to the Portal](#)

If you are having any issues with your account, please don't hesitate to contact us by replying to this mail.

Thanks!

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:



1. My Applications: Gives you access to all applications and programs in your Portal account.

2. My Awards: Gives you access to all the programs where you were awarded.

3. My Profile: Gives you access to your profile information.

1.2. Setting up your eCivis Portal account profile

Once you log in to Portal for the first time, you will be taken to My Profile, where you can complete your profile information that will be used when submitting applications for review and consideration:

1) Fill out all fields with red asterisks, as these are required to continue.

NOTE: You will need to complete a profile for every submitted application. However, information entered on this page will automatically be inserted into each new

application profile.

- 2) Click on the Update Profile button, located at the bottom left of the Profile Form to save your profile. A green success message should appear in the top right corner of your screen:

The screenshot shows a profile form with the following fields: City (Pasadena), State (California), Business/Finance Representative, Organization Address, Address, City, State, County, Congressional District/Region, Zip, Phone, and Fax. A red arrow labeled '1' points to the 'Update Profile' button at the bottom left. A green success message at the top right reads 'Your profile information has been saved successfully'. A red arrow labeled '2' points to the 'Address' field.

- 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.

1.3. Resetting your Password

- 1) Click “Forgot Password?”:

The screenshot shows a login page with the following elements: a 'Login' field with a red border and a red error message 'Please enter your username.'; a 'Password' field with a red border and a red error message 'Please enter your password.'; a note '(Minimum 8 chars, alphanumeric with symbol(s))'; two blue buttons: 'Portal Login' and 'eCivis® Login'; a red arrow pointing to the 'Forgot Password?' link; a link 'Don't have an account?'; a green button 'Create an account'; and a note 'eCivis Grants Network user? Use your existing login above and the eCivis Login button.'

- 2) Enter your email address in the box that appears, and click “Reset”:

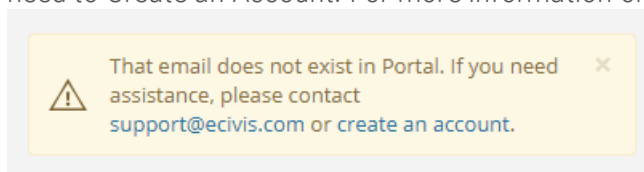
Forgot password?

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

Reset

[← Back to Login](#)

- 3) If you have never signed up for Portal before, a yellow error message will appear that indicates that your email address is not in the Portal system. This means you may need to Create an Account. For more information on that process, see section 1.1:



2. Reviewing and submitting your application

2.1. Accessing your Application

- 1) The grantor will choose how to publicize their solicitation for application. You will receive the link to this solicitation through one of two methods:

Some grantors will provide a link to their *Public Solicitations Listing* page or will embed this page on a designated webpage within their website. Clicking a specific solicitation here will take you to the specific solicitation page in #2:

Name of Granting Agency		
Programs available for Solicitation		
Administration		
Solicitation Name	Application Start Date	Application End Date
Historic Preservation Trust	12/11/2016	12/30/2020
Electric Bus Fleet Implementation	01/15/2019	03/15/2020
Transportation (TEST KW)	01/01/2020	02/07/2020
Community Development		
Solicitation Name	Application Start Date	Application End Date
Community Development Block Grant	01/01/2020	03/15/2020

Other grantors will share a link to the individual solicitation page as shown below:

Community Development Block Grant

[Apply](#)

Overview | Eligibility | Financial | Contact | Files

ID: ABC-123

Title: Community Development Block Grant

Application Start Date: 01/01/2020

Summary:

The purpose of this program is to support the development of viable urban communities by funding entitled cities and counties to provide decent housing, a suitable living environment, and expanded economic opportunities which give maximum priority to low- and moderate-income individuals. Award recipients may use funds to conduct a variety of community-based activities directed toward neighborhood revitalization, economic development, and community

- 2) Click the “Apply” button to begin drafting your application. This will take you into your Portal account:

Community Development Block Grant

[Apply](#)

Overview | Eligibility | Financial | Contact | Files

ID: ABC-123

- 3) After logging into Portal, if you haven’t already, you will be taken to the “My Applications” section of your Portal account.
- 4) Click “Create New Application” to create an application for the grant:

Human Services
Childhood Development - Social & Economic Development Strategies

My Applications

[Create New Application](#)

Show 10 entries

Search:

Grant Application	Create Date	Status	Actions
No applications have been saved or submitted			

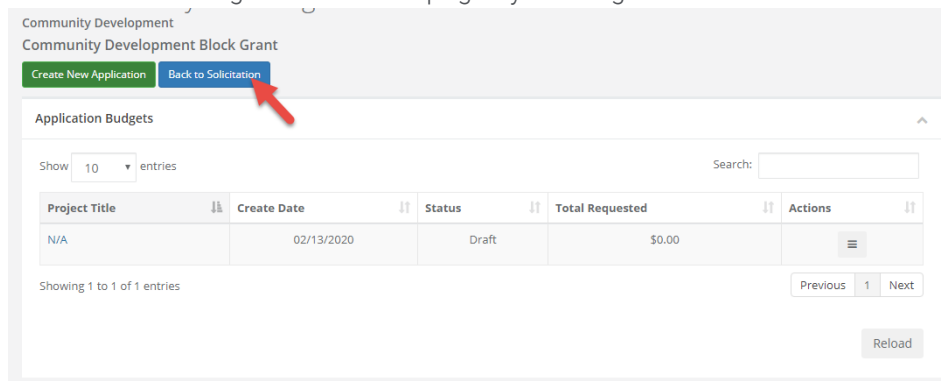
Showing 0 to 0 of 0 entries

[Previous](#) [Next](#)

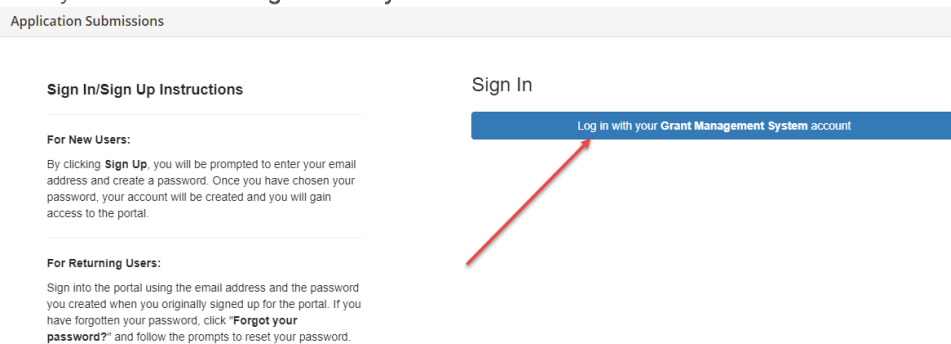
[Reload](#)

NOTE: If this program accepts multiple applications, you will be able to return to this page and click this button once for each application draft you wish to begin in your

account. You can get back to this page by clicking “Back to Solicitation”:

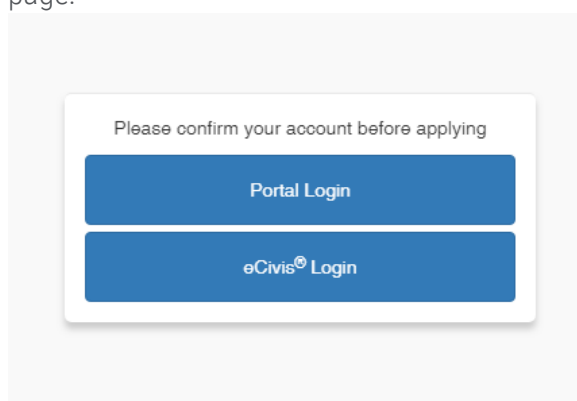


- 5) For each application, you will need to verify your account. Click on the blue “Log in with your Grant Management System Account” button:



NOTE: This secondary login is located *below* the “Application Assets” section. Scroll down until you see it.

- 6) Select eCivis Login, then use the same log in information from the very first log in page:



- 7) You will need to verify and complete your Application Profile before generating the application. Click on the Pencil Icon to edit the profile:

Homepage

Profile

Profile
ⓘ Action Required
👁️
✎

- 8) Complete all Applicant and Organization field information. If you plan to complete your profile at a later time, select *Save Draft*:

Applicant Information

Tell us about you.

First name *

David

Last name *

Shea

Email *

dshea@ecivis.com

Title

City Manager

Company

Government Organization

Organization Information

Tell us about your organization.

Organization Name

Government Organization

Employer Identification Number (EIN)

123456789

DUNS

123456789

NOTE: When entering your Employer Identification Number (EIN) and DUNS numbers, enter as a single 123456789 of numbers with no spaces or characters in between the numbers.

Organization Address

Address

1234 Any Street

Address2

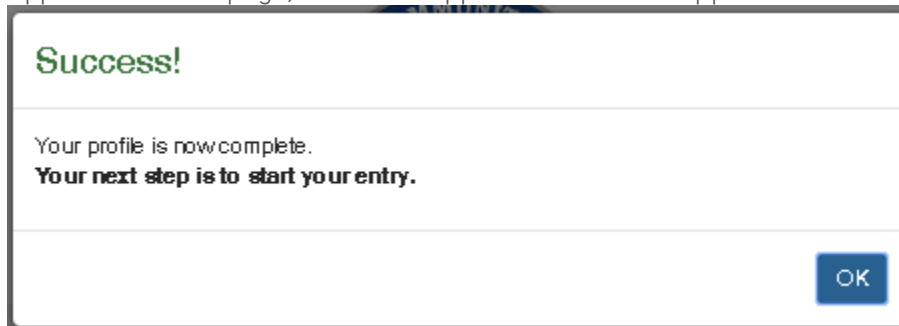
City

New York

State

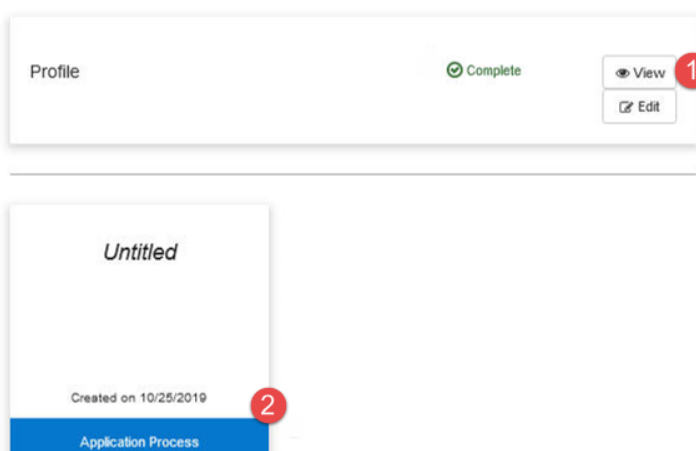
New York

- 9) Click "Save." If you completed your profile correctly, you will be taken back into the Application Homepage, where the application will now appear:



You will see the following screens:

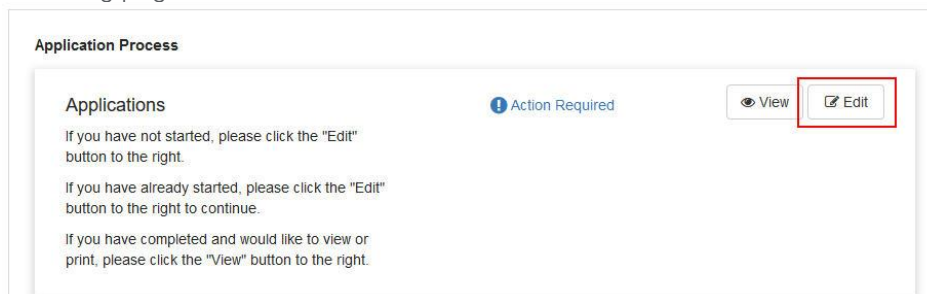
Homepage



1. **Profile:** "Action Required" will appear if a component is missing. It will say "Complete" if it is correctly done.
2. **Application Process:** this will change depending on the status of your application. Click here to view or edit your application.

2.2. Saving application drafts

- 1) Click on Application Process to work on the application. You will be taken to the following page:



1. Once you edit the title of your application, you can begin completing all required fields.
2. If your application has all required fields completed. "Action Required" will appear if a component is missing. It will say "Complete" if it is correctly done.
3. **View:** A printable version of your application is available by clicking on the View button. Files will need to be saved or printed separately; only the file title will be displayed.
4. **Edit:** Click here to edit your application.
5. **Submit:** The Submit button is only available if all required fields have been completed. Once you have saved the final version of your application, this will turn green and you can click it to submit your application to Under Review.

If you have clicked on "Edit," you will be brought to the next section of your application where you can provide basic information on your project proposals and needs:

Project Title *

Organization Name *

Project Description

Click "Save" at the bottom of the page to complete this section of the application:

Are you in compliance with the Program Income Reuse Agreement?

Budget Worksheet

I have completed and submitted my budget worksheet?

Yes

No

Saved at 3:01:45 PM

Save Draft **Save**

2.3. Submitting the Budget Worksheet

Your application will often require that you complete and submit a budget proposal using the *Budget Worksheet* tool.

A Budget Worksheet will appear that corresponds with each application you have created. This will appear in the Application Assets section:

Application Assets

Show 10 entries

Project Title	Create Date	Status	Total Requested	Actions
N/A	03/03/2020	Draft	\$0.00	
N/A	03/05/2020	Draft	\$0.00	Edit Budget

Showing 1 to 2 of 2 entries

Previous 1 Next

- 1. Project Title:** The title of your budget so you can keep track of which budgets are for which applications.
- 2. Total Requested:** See a summary of your proposed budget costs.
3. Click the “3 Line” button to access “Edit Budget.” This lets you edit your budget.

2.3.1. Creating Budget Items

1. Click on one of the budget categories titles:

1. Personnel

	Ext Cost	Direct Cost	Ind Cost	Cost Share
Personnel Totals:				

2. Add a table to each budget category where you wish to enter line items:

+ Add Subcategory for Activity

+ Add Table

	Ext Cost	Direct Cost	Ind Cost	Cost Share
Personnel Totals:				

3. After adding a table you can enter specific budget item and use the Cost field to enter the amount for each item:

	Ext Cost	Direct Cost	Ind Cost	Cost Share
Personnel Totals:	\$0.00	\$0.00	\$0.00	\$0.00

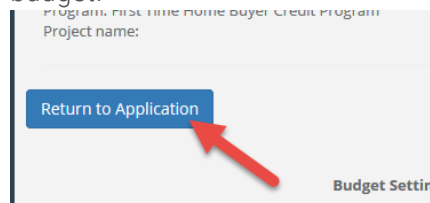
Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Item Type
		0.00	\$0.00	\$0.00	\$0.00		Direct Cost

2.3.2. Creating a budget narrative

The budget narrative is available to provide additional detail, explanation, and/or justification to specific budget line items. The budget narrative is also fully compatible with Microsoft Word. Already developed narratives can be cut and pasted into this section:

1. Use the text field to enter your budget narrative.
2. Use the formatting tools to edit the way your budget narrative appears.
3. Use the “Save Narrative” button to save your budget narrative.
4. Use this button to export your budget narrative as a PDF file.

When finished, click the Return to Application button in the top left corner of your budget:



2.4. Submitting Project Goals

Your application may require that you complete and submit goals for your proposal using the Application Goals section.

Application Assets						
Project Title	Create Date	Status	Total Requested	Actions		
N/A	04/06/2020	Draft	\$0.00	Edit Budget		
N/A	04/06/2020	Draft	\$0.00	Edit Goals		

1. **Project Title:** The title of your budget so you can keep track of which budgets are for which applications.

2. **Actions:** Under the available actions continue to Goals
3. Click the “3 Line” button to access “Edit Goals.” This lets you edit your goals

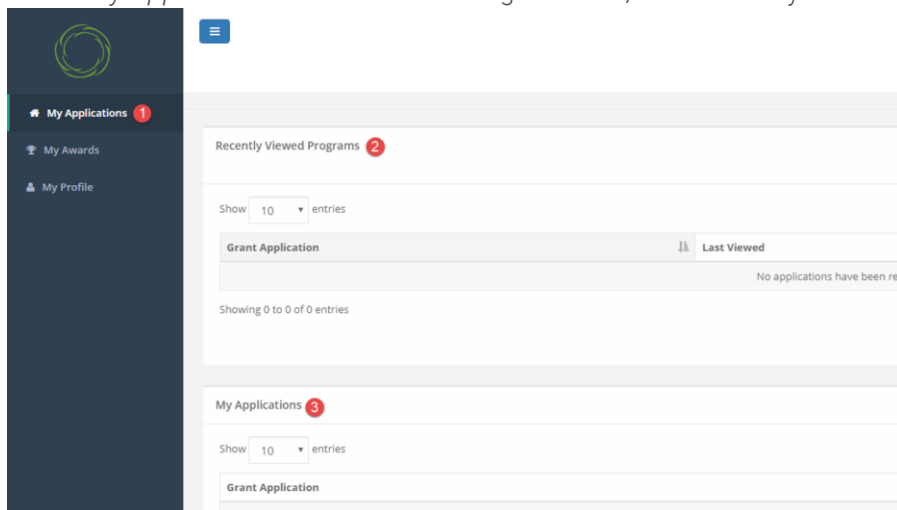
2.4.1. Creating Application Goals

Enter in the goals provided by the Grantor in the fillable boxes

1. To save your goals, select “save goals”
2. To go back to your application, select “Return to Application”

2.5. Finding your existing applications

The My Applications page is your homepage. If you are logging in after your first login, or select *My Applications* from the left navigation bar, this is what you will see:

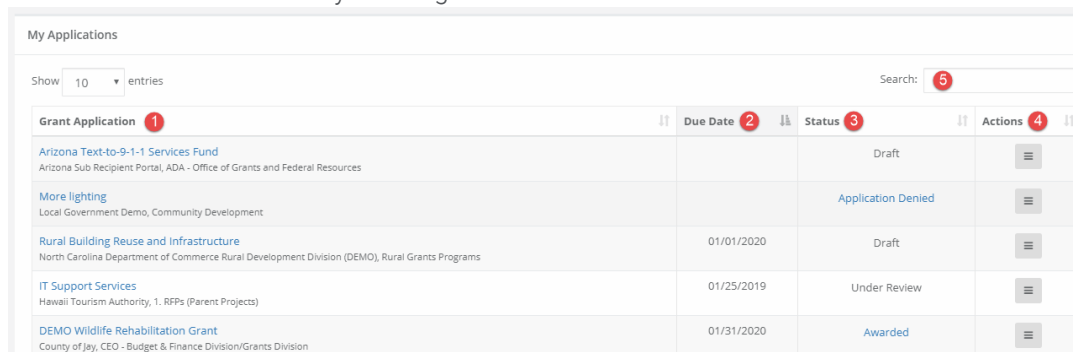


1. My Applications: Your homepage.

2. Recently View Programs: The last few programs on which you worked.
3. My Applications Section: All applications on which you are working, or have submitted.

2.5.1. Managing your applications

All of your current drafts and historical applications will appear in My Applications and you can sort this information by clicking on the column headers:



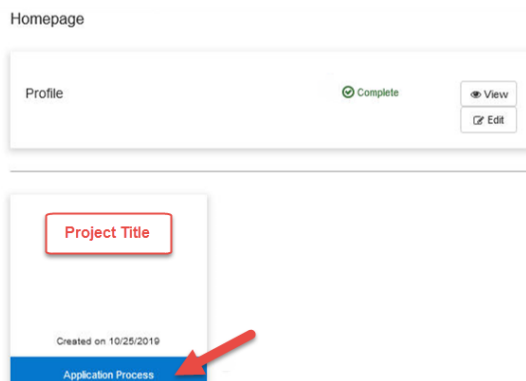
Grant Application ¹	Due Date ²	Status ³	Actions ⁴
Arizona Text-to-9-1-1 Services Fund Arizona Sub Recipient Portal, ADA - Office of Grants and Federal Resources		Draft	⋮
More lighting Local Government Demo, Community Development		Application Denied	⋮
Rural Building Reuse and Infrastructure North Carolina Department of Commerce Rural Development Division (DEMO), Rural Grants Programs	01/01/2020	Draft	⋮
IT Support Services Hawaii Tourism Authority, 1. RFPs (Parent Projects)	01/25/2019	Under Review	⋮
DEMO Wildlife Rehabilitation Grant County of Jay, CEO - Budget & Finance Division/Grants Division	01/31/2020	Awarded	⋮

1. **Grant Applications:** title of the program you are applying to. Click on these to access the program's application
2. **Due Date:** view when the application is due
3. **Status:** the status of your application can be:
 - **Draft:** Your application is in progress.
 - **Under Review:** Your application has been submitted and will be reviewed by the committee.
 - **Awarded:** Your application has been approved and awarded.
 - **Application Denied:** Your application has been denied, and will not be awarded.
4. **Actions:** options will change depending on the status of your application Draft. These are the options you will see based on each status:
 - **Draft:** View/edit application or navigate to the solicitation.
 - **Under Review:** View your submitted application or navigate to the solicitation.

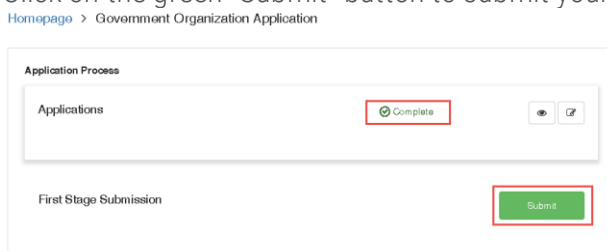
- **Awarded:** View your award or navigate to the solicitation.
 - **Application Denied:** Navigate to the solicitation.
5. **Search:** If you are responsible for multiple applications, you can search for the program to narrow down the My Applications table.

2.5. Submitting your application

- 1) Once all sections of the Application and Budget are completed you're ready to submit your application.
- 2) Under the Application Submission heading, make sure you've clicked your project title card:



- 3) Click on the green "Submit" button to submit your application:



- 4) You will receive a confirmation that your application was successfully submitted:

