

eCivis User Guide: Subrecipient Manual

User Guide

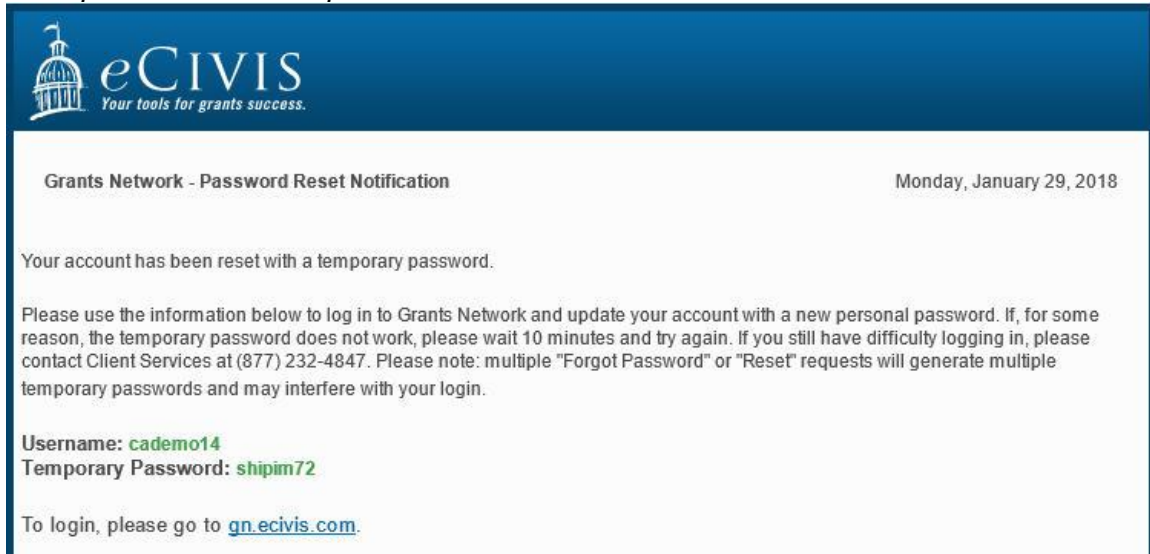
Contents:

- Setting up your account
- My Projects
- Completing an approval task
- FAQ

Setting up your account

After an award has been made, if this is your first time receiving an award you will receive an invitation from eCivis to setup your account. If you have already set up an account previously after receiving an award, you do not need to setup a new account.

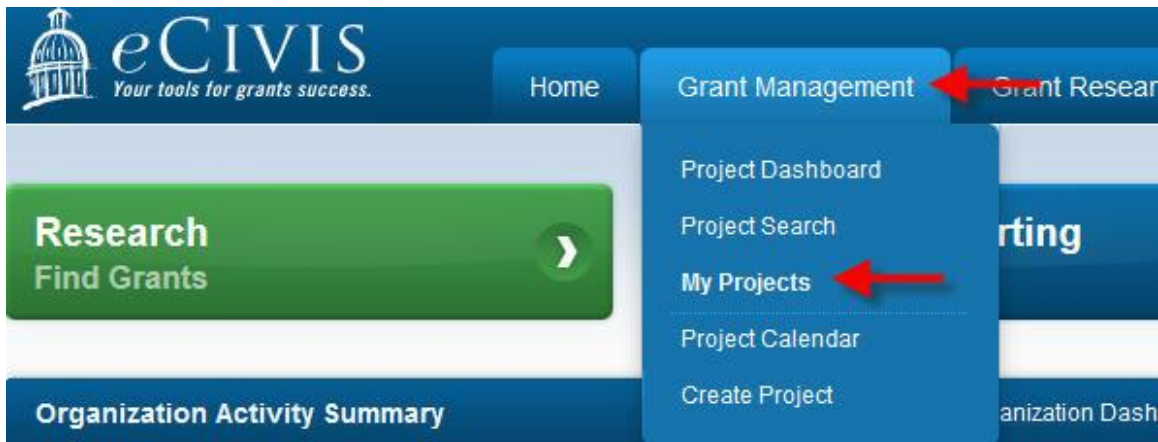
Example of account setup email:



Follow the instructions in the email to complete your account setup.

My Projects

To see all of the projects/grant awards you have currently been awarded go to the *Grants Management* tab and select *My Projects*.



On the *My Projects* page you will see all the projects you are currently assigned to. To access a Project/Grant Dashboard click on the project title.

My Projects

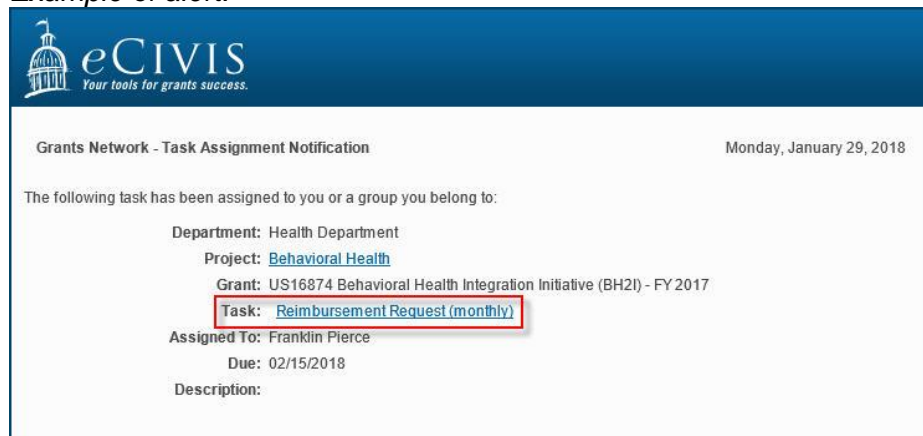
[Project Search](#) [Project Calendar](#) [Create Project](#)

Project	Department	My Pending Tasks
Access to medicine	Health Department	1
Accountability in Health	Health Department	5
Adult Literacy	Health Department	2

Completing an approval task

Once the funding agency has established the ongoing reports that will be required, alerts will be emailed when tasks are assigned to you. The email will include the project, grant, and task type that has been assigned to you.

Example of alert:



The screenshot shows an email notification from eCIVIS. The header includes the eCIVIS logo and the tagline "Your tools for grants success." The subject of the email is "Grants Network - Task Assignment Notification" and the date is "Monday, January 29, 2018". The main body of the email states: "The following task has been assigned to you or a group you belong to:". Below this, the details are listed: "Department: Health Department", "Project: Behavioral Health", "Grant: US16874 Behavioral Health Integration Initiative (BH2I) - FY 2017", "Task: Reimbursement Request (monthly)", "Assigned To: Franklin Pierce", "Due: 02/15/2018", and "Description:". The "Task" line is highlighted with a red box in the original image.

Make sure to read the description for instructions on any additional documentation that needs to be uploaded and submitted with the task.

To complete the task, select the task name from the email and you will be taken to the *Approval Request Form* page where you can upload any required documents and complete the task.

On the *Approval Request Form*, upload all required documents, set the Approval due date for 2 weeks from the present day, add any clarifying notes to the approver, and select **Save**.

Example of Approval Request Form



Approval Request Form

Approval Request Form

Project: Behavioral Health



Grant: US16874 Behavioral Health Integration Initiative (BH2I) - FY 2017



Task: Rqst Approval: Reimbursement Request (monthly)

Attachments:  

Description: N/A


Approver: Scott Williams, asd
City Attorney

Approval Due*:  

Reminder:  

Files to Forward: No files are currently attached.

Notes to Approver:
500 Characters Left



Once the request has been approved, you will automatically be notified of the decision. If approved, the task will be removed from the *Pending Tasks* tab to *Completed tasks*. You can check the *Completed Tasks* tab to review the task or confirm it has been completed.

Pending/Completed tasks tabs:

Task Name	Grant	Stage	Assigned To	Due	Reminder	File(s)	Done
Contract Close	US16874: FY2017	Grant Awarded	S. Williams	12/31/2018	12/15/2018	 	<input type="checkbox"/>

Completed Tasks tab:

Completed Tasks

Behavioral Health

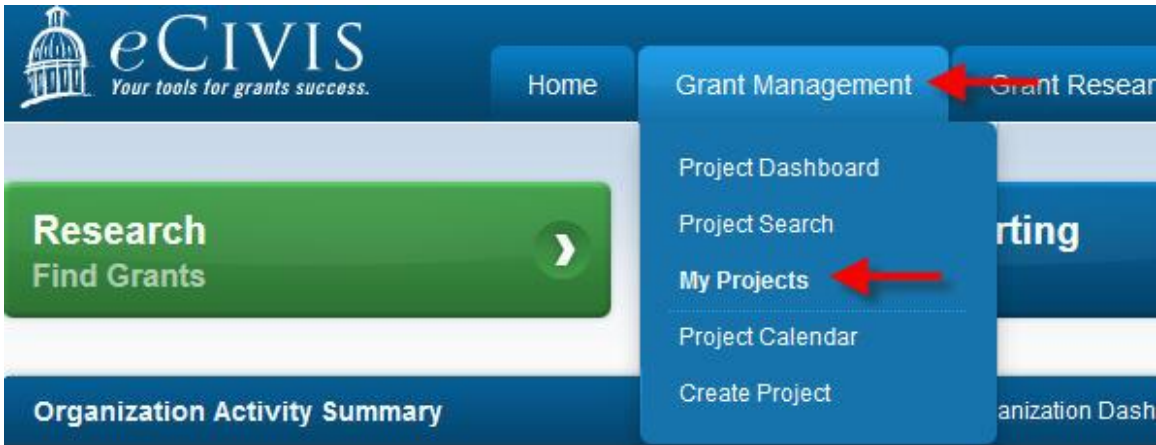
US16874 Behavioral Health Integration Initiative (BH2I) - FY 2017 - Minimize									
Stage	Task Name	Due	Completed On	Completed By	Download Files	Manage Files	Edit	Notes	
Grant Awarded	Application Submitted	08/15/2017	08/15/2017	S. Williams					
Grant Awarded	Rqst Approval: Award Setup form		01/29/2018	S. Williams					
Implementation	Rqst Approval: Reimbursement Request (monthly)	02/15/2018	01/30/2018	S. Williams					
Implementation	Approval Reqd: Reimbursement Request (monthly)	02/10/2018	01/30/2018	S. Williams					
Implementation	-Approved	02/10/2018	01/30/2018	S. Williams					

Done >

FAQ

What if I missed or deleted the task assignment email? How do I find it again?

To find any pending tasks that may still be assigned to you, log into eCivis and go to the my project page.



At the top of the page click on *Project Calendar*.

My Projects

Project	Department	My Pending Tasks
Access to medicine	Health Department	1
Accountability in Health	Health Department	5

On this page you can see in a calendar view any upcoming tasks. You can also click on the *Display as List* option on the right side of the page to see a chronological listing of all tasks assigned to you, their status, due date, and a link to the task.

Project Calendar

Project Calendar

January 2018

My Projects
 All Projects

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
31 My Tasks: 2 All Tasks: 3	Jan. 1, 2018 My Tasks: 1 All Tasks: 1	2	3	4	5 My Tasks: 1 All Tasks: 1	6

Displayed as a list

Project Calendar

Tasks

My Projects
 All Projects

Project	Department	Task	Project Lead	Assigned To	Grant	Item Due
Health Coordination	Health Department	Test	S. Williams	M. Fillmore	US15330 Early Head Start (EHS) Expansion and Migrant and Seasonal EHS-Child Care Partnerships - FY 2015	01/01/2015
ESL	Health Department	Approval Req'd. Department...	S. Williams	J. Adams	US11321 AmeriCorps VISTA Program - FY 2016	09/16/2016
Older American's Act Allocations - Applications	Health Department	OAAA Application - Baltimo...	S. Williams	C. Coll	General	04/15/2017
Regional Drug Task Force Grant	City Attorney	Q1 Financial Report	S. Williams	L. Alexander	US1834 Volunteer Fire Assistance (VFA) Program - FY 2016	10/07/2017

