

eCivis Grants Network

California Housing and Community Development External User Manual

Contents

Managing my application process	Page 2.
Chapter 1. Creating your eCivis Portal Account	Page 2.
1.1. What is an eCivis Portal account?.....	Page 2.
1.2. How do I create an account?.....	Page 3.
1.3. How do I create my eCivis Portal account profile?	Page 5.
1.4. What if I forgot my password?	Page 6.
Chapter 2. Reviewing and submitting your application.....	Page 7.
2.1. Where do I find my applications?	Page 8.
2.2. How do I manage my applications?	Page 8.
2.3. How do I access my application and begin working on it?	Page 9.
2.3. Can I save my application without submitting it?	Page 16.
2.4. Completing the application	Page 17.
Chapter 3. Submitting the Budget Worksheet	Page 20.
3.1. How do I create budget items?.....	Page 20.
3.2. Can I create a budget narrative?.....	Page 21.
Chapter 4. How can I submit my application?	Page 22.
Managing my sub-award.....	Page 23.
Chapter 5. Accepting and managing my award.....	Page 23.
5.1. How do I receive and accept my award notification?	Page 23.
5.2. How do I manage my awards?.....	Page 29.
5.3. What does the award dashboard tell me?.....	Page 30.
5.4. How will I submit financial reports?	Page 32.
5.5. How will I submit activity reports?	Page 38.
5.6. How will I submit a grant amendment?	Page 40.
Glossary of Terms	Page 44.

Managing my application process

As an applicant, I would like to apply for program solicitations and managing my application process.

Chapter 1. Creating your eCivis Portal Account

1.1. What is an eCivis Portal account?

If you are applying to a program solicitation, you will need to create a Portal account. Go to [eCivis Portal Login Page](#) to create your Portal account. 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' page. On the left, there is a green circular logo and text: 'Welcome to the Portal', 'This service provided by eCivis makes it possible for interested parties to save, collaborate, and apply for solicitations.', and 'Login, or create a free account to start.' On the right, there is a login form with the following elements: a 'Login' text input field, a 'Password' text input field with a note '(Minimum 8 chars, alphanumeric with symbol(s))', two blue buttons: 'Portal Login' (marked with a red circle 1) and 'eCivis® Login' (marked with a red circle 2), a blue link 'Forgot Password?' (marked with a red circle 3), a green link 'Don't have an account?' with a green button 'Create an account' (marked with a red circle 4) below it, and a footer note 'eCivis Grants Network user? Use your existing login above and the eCivis Login button.'

1. Portal Login: for users who have an eCivis Portal account only or are creating a new eCivis Portal account and do not already have an eCivis Grants Network account.
2. eCivis Login: for users who have an eCivis Grants Network account. It will be the same username and password used to log into eCivis Grants Network.
3. Forgot Password? Reset your password by entering your email on the following window

California Housing and Community Development External User Manual
Chapter 1. Creating your eCivis Portal Account

4. Create an account: for new users without a Portal account

1.2. How do I create 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. First Name
2. Last Name
3. Email Address: Your full email address where you will receive your confirmation email. Your full email address will also be your username
4. Password: Your password must consist of uppercase and lowercase letters, numbers, and a special character. (Example "PassW0rd\$". Using a capital P, a capital W, a zero in place of the letter o and ending with a \$ symbol)
5. Sign up: Clicking here will send you a confirmation email. You will need to click on the Portal link in the email to activate your account:
6. Clicking on the Sign Up button and Portal will send you a confirmation email. You will need to click on the Portal link in the email to activate your account.
7. You will be taken to the Welcome to Portal Confirmation Page. Now click on the Login to the Portal and enter you login credentials.



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](#)

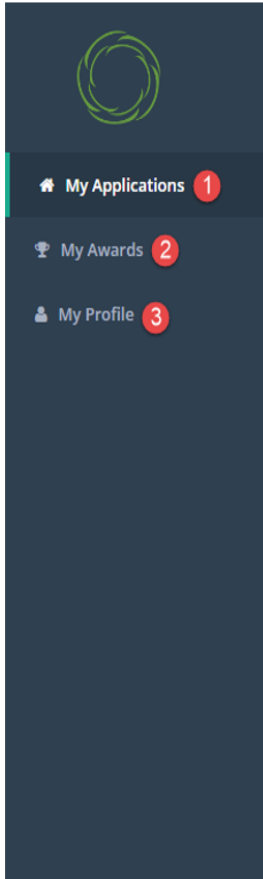
If you are having any issues with your account, please don't hesitate to contact us by replying to this mail.

Thanks!

9. You will be taken to your Portal Navigation Bar where you can select My Applications, My Awards or My Profile.

Note: If this is your first time in Portal you will be asked to complete your Profile.

California Housing and Community Development External User Manual
Chapter 1. Creating your eCivis Portal Account



1. My Applications: Access to all applications and programs.
2. My Awards: Access to all the programs that you were awarded.
3. My Profile: Access to your profile information.

1.1. How do I create my eCivis Portal account profile?

1. 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. Fields with red asterisks are required.

California Housing and Community Development External User Manual

Chapter 1. Creating your eCivis Portal Account

Note: You will be required to complete a profile for every submitted application. Information entered on this page will automatically be ported into each application profile.

2. Click on Update Profile, located at the bottom left of the profile form to save your profile information. A green success message should appear in the top right corner.



Note: This can be edited at any time by selecting *My Profile* from the left navigation bar.

1.2. What if I forgot my password?

Click on the *Forgot Password* text, enter your email address, and click on the Reset button. You can then re-enter your email to be sent a new password:

California Housing and Community Development External User Manual

Chapter 2. Reviewing and submitting your application

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.



{Minimum 8 chars, alphanumeric with symbol(s)}

Portal Login

or



eCivis[®] Login

[Forgot Password?](#)

Don't have an account?

[Create an account](#)

eCivis Grants Network user?

Use your existing login above and the eCivis Login button.

© 2019 All rights reserved. eCivis, Inc.

[Privacy Policy](#) and [Terms of Service](#)

Forgot password?

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

Reset

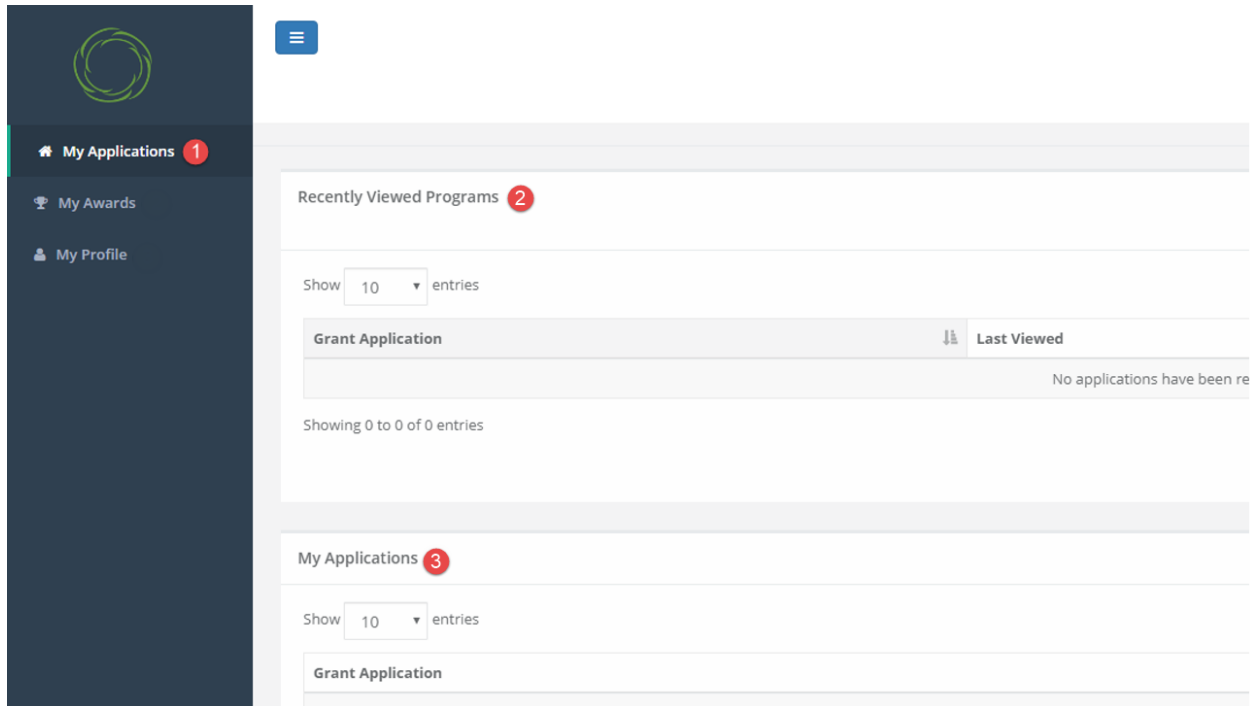
[← Back to Login](#)

Chapter 2. Reviewing and submitting your application

As an applicant, I would like to review and submit an application.

2.1. Where do I find my 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 Viewed Programs: The last few programs you worked on.
3. My Applications: All applications that you are working on or have submitted.

2.2. How do I manage my applications?

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

California Housing and Community Development External User Manual

Chapter 2. Reviewing and submitting your application

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:
 - a. **Draft*:** your application is in progress
 - b. **Under Review:** your application has been submitted and will be reviewed by the committee
 - c. **Awarded**
 - d. **Application Denied**
4. **Actions:** options will change depending on the status of your application
Draft*: your application is in progress
 - a. **Draft:** View/edit application or navigate to the solicitation
 - b. **Under Review:** View your submitted application or navigate to the solicitation
 - c. **Awarded:** View your award or navigate to the solicitation
 - d. **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.

2.3. How do I access my application and begin working on it?

To edit or work on an application in a "Draft" status, you will need to open the application.

1. Click on the title of the program.

California Housing and Community Development External User Manual

Chapter 2. Reviewing and submitting your application

My Applications

Show 10 entries Search: stat

Grant Application	Due Date	Status	Actions
State Opioid Response Prevention Grant <small>Arizona: SYA - Office of Youth, Faith and Family</small>	09/18/2019	Draft	

Showing 1 to 1 of 1 entries (filtered from 56 total entries)

Previous 1 Next

NOTE: If you do not see the application you want to apply for in your *My Applications* section, click on the link below to access the CA HCD solicitations listing page.

[SOLICITATIONS LISTINGS PAGE](#)

California Department of Housing and Community Development

Programs available for Solicitation

Community Development Block Grants		
Solicitation Name	Application Start Date	Application End Date
CDBG - OTC	10/01/2019	12/31/2019
CDBG - Competitive	10/01/2019	10/15/2030
CDBG Competitive Simple	10/04/2019	11/04/2021

Community Development Block Grants-Disaster Recovery		
Solicitation Name	Application Start Date	Application End Date
CDBG - Disaster Recovery	10/01/2019	12/31/2019
CDBG-DR Simple		

2. Click on the program you want to apply for and click on the apply button in the top left hand corner.

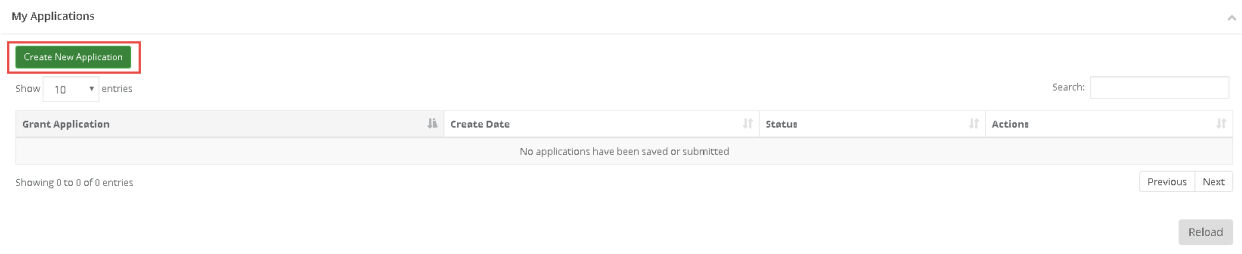
California Department of Housing and Community Development	
CDBG Competitive Simple	
<input type="button" value="✓ Apply"/>	
Overview Eligibility Financial Contact Files	
ID:	N/A
Title:	CDBG Competitive Simple
Application Start Date:	10/04/2019
Application End Date:	11/04/2021
CFDA:	N/A
Reference URL:	

Note: If you do not already have an eCivis Portal account or are not already logged into your eCivis Portal account, you will need to follow the steps outlined in section 1.2

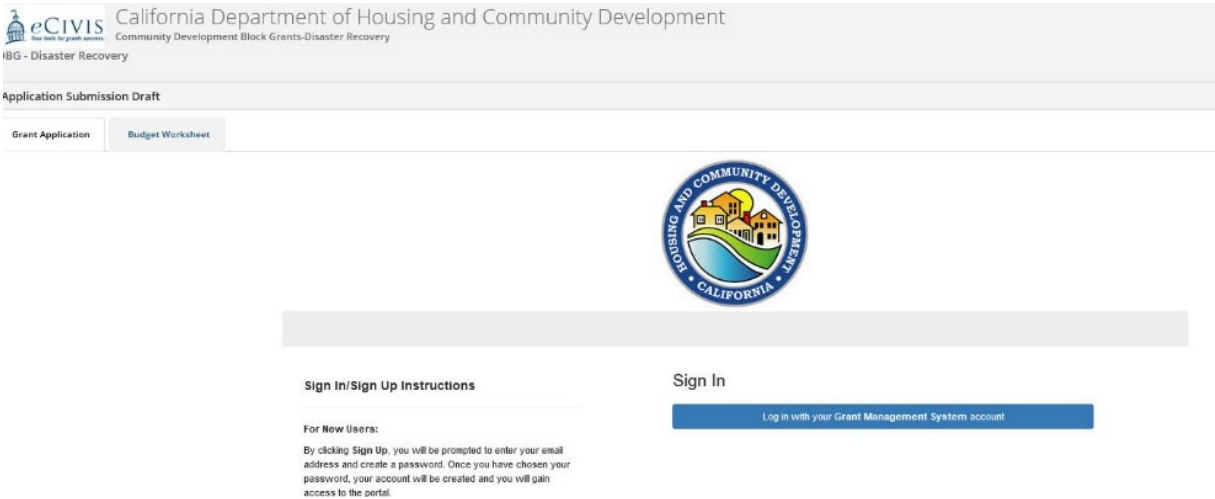
3. Click on the Create New Application button to begin the application submission process.

California Housing and Community Development External User Manual

Chapter 2. Reviewing and submitting your application



4. For each application, you will need to verify your profile and account information. Click on the Log in with your Grant Management System Account button.

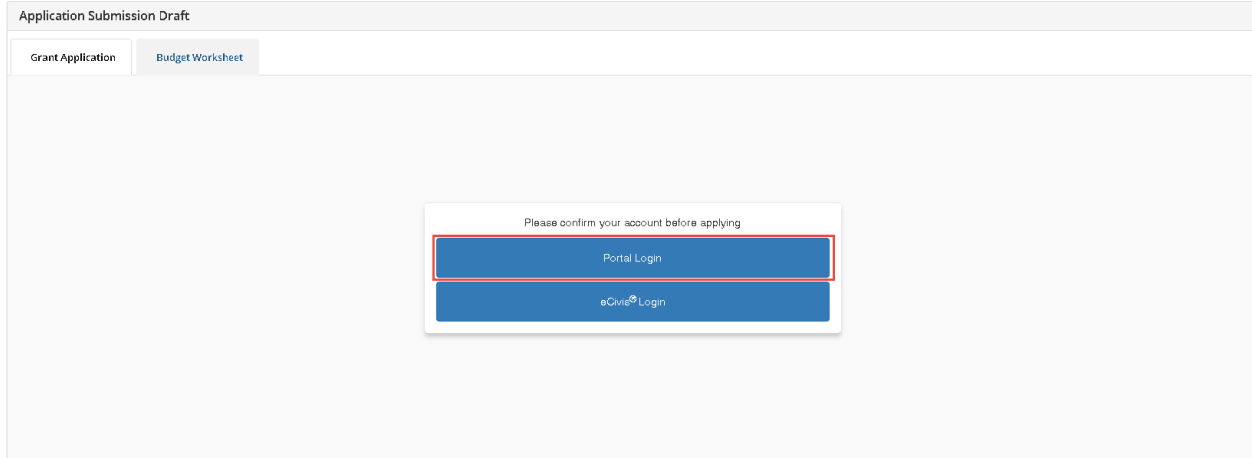


5. For eCivis Portal Users, click on the Portal Login button and then use the same log in information entered on Welcome to the Portal login page:

Note: Portal Login: for users who have an eCivis Portal account only or are creating a new eCivis Portal account and do not already have an eCivis Grants Network account.

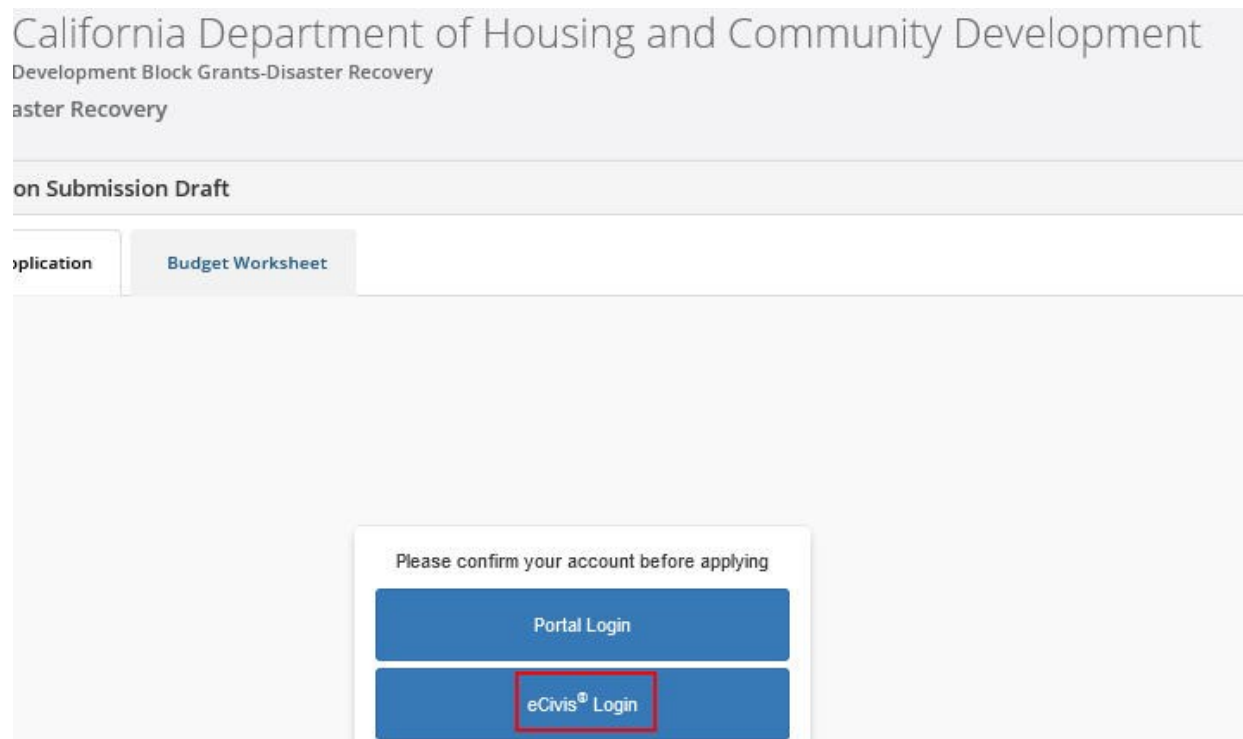
California Housing and Community Development External User Manual

Chapter 2. Reviewing and submitting your application



6. For eCivis Grants Network Users, click on the eCivis Login button and then use the same log in information from the very first log in page:

Note: eCivis Login: for users who have an eCivis Grants Network account.



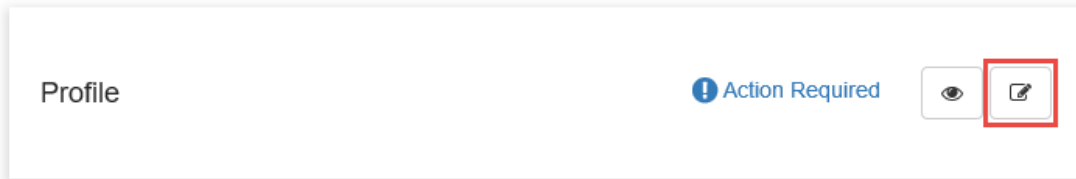
7. You will need to verify and complete your Application Profile before generating the application. Click on the Pencil Icon to edit the profile:

California Housing and Community Development External User Manual

Chapter 2. Reviewing and submitting your application

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

eCivis Test

Employer Identification Number (EIN)

123456789

DUNS

123459789

Authorized Representative

Business/Finance Representative

California Housing and Community Development External User Manual

Chapter 2. Reviewing and submitting your application

Note: When entering your Employer Identification Number (E.I.N.) and DUNS numbers, **enter as single string of numbers** with no spaces or characters in between. (Example123456789)

Organization Address

Address

1234 AnyStreet

Address 2

City

NewYork

State

New York

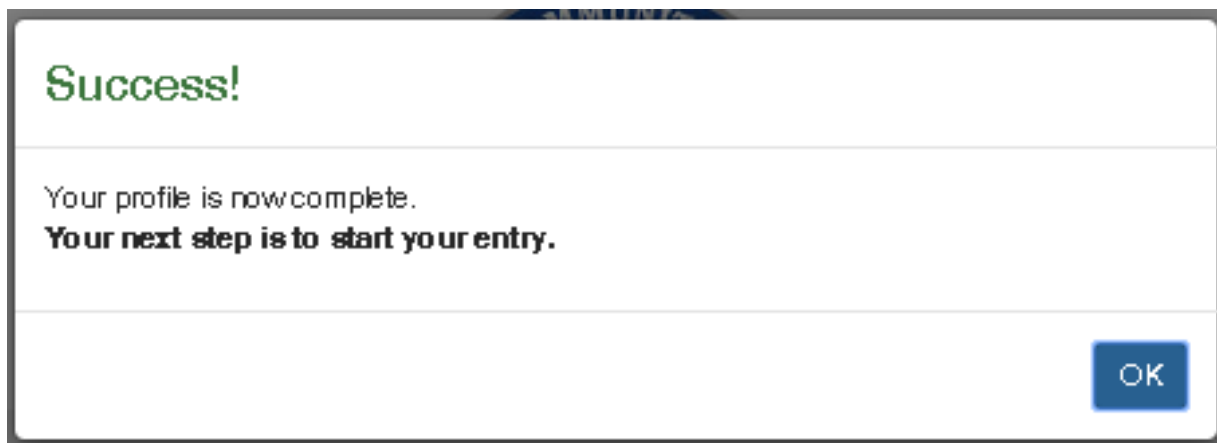
Note: For the *CDBG – Competitive* or *CDBG – OTC* grant programs. If you are applying on behalf of an additional jurisdiction, select yes to the question at the bottom of the profile and add the additional jurisdiction information.

Are you applying on behalf of an additional jurisdiction?

Yes

No

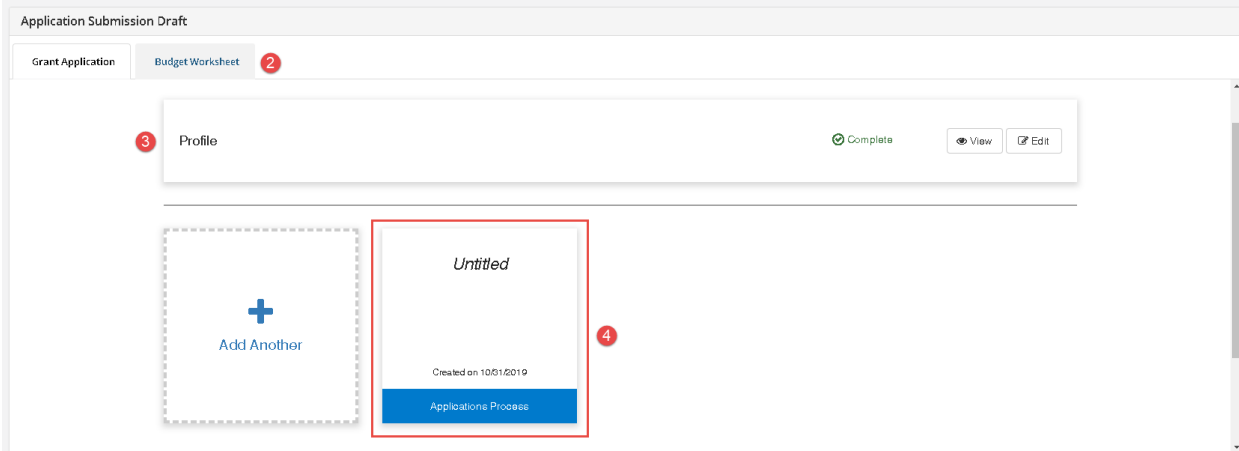
9. Click *Save*. If you completed your profile correctly, you will be taken back into the Application Homepage, where the application will now appear:



California Housing and Community Development External User Manual

Chapter 2. Reviewing and submitting your application

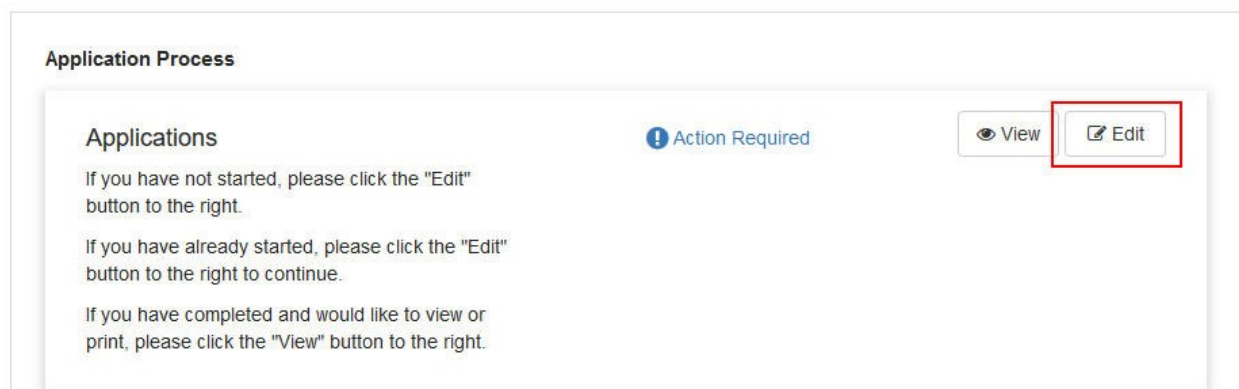
Community Development Block Grant Disaster Recovery Program **1**



1. Title of the Program
2. Budget Worksheet: The Budget component of the application. If this does not appear, the application is accepting a budgets as a file upload or does not require one at all.
3. Profile: "Action Required" will appear if a component is missing. It will say "Complete" if it is correctly done
4. Application Process: this will change depending on the status of your application. You will either click on the + Create and Application lick here to view or edit your application.

2.4. Can I save my application without submitting it?

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



Note: Once you edit the title of your application, you can begin completing all required fields.

1. 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
 2. 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
 3. Edit: Click here to edit your application
 4. 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
2. If you have clicked on *Edit* and you will be brought to the next section of your application where you can provide basic information on your project and threshold criteria.

2.5. Completing the application

Sections I-V are the core elements of your application and will serve as the key components of your standard agreement should you be awarded.

1. Section I - First provide a title and description of your application.

Section I

Project Title *

Organization Name *

Project Description

2. Section II – Provide a detailed scope of the work to be completed.

Section II

Detailed Scope of Work

3. Section III – Provide at a minimum a beginning and ending milestones for the project. Additional milestone can be added.

Section III

Milestone #1

Milestone #1 Completion Date

Milestone #2 (optional)

Milestone #2 Completion Date (optional)

4. Section IV – Provide an activity category, HUD Activity and National objective.

NOTE: the activity category chosen will determine the HUD Category, National Objective, and Readiness Criteria in the application.

Section IV

Activity Category

5. Section V – Provide the beneficiaries and metrics for assistance.

Section V

Measure Indicator

Number of Beneficiaries

Beneficiary Types

- Physically Disabled
 Persons with AIDS

6. Click *Save* at the bottom of the page to complete this section of the application

Grant Application | Budget Worksheet

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**

Chapter 3. Submitting the Budget Worksheet

As an applicant, I am required to complete and submit a budget proposal. The Budget Worksheet is accessible underneath the Application Submission Draft header if an electronic budget template is being used by the grantor.

Budget Items ^

	<u>Ext Cost</u>	<u>Direct Cost</u>	<u>Ind Cost</u>	<u>Cost Share</u>
1. Activity	\$0.00	\$0.00	\$0.00	\$0.00
2. General Administration	\$0.00	\$0.00	\$0.00	\$0.00

3.1. How do I create budget items?

1. Click on one of the budget categories and add a table to enter line items under your activity delivery or general administration.

1. Activity

	<u>Ext Cost</u>	<u>Direct Cost</u>	<u>Ind Cost</u>	<u>Cost Share</u>
Activity Totals:	\$0.00	\$0.00	\$0.00	\$0.00

+ Add Subcategory for Activity
+ Add Table

	<u>Ext Cost</u>	<u>Direct Cost</u>	<u>Ind Cost</u>	<u>Cost Share</u>
General Administration Totals:	\$0.00	\$0.00	\$0.00	\$0.00

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

California Housing and Community Development External User Manual

Chapter 3. Submitting the Budget Worksheet

Activity 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

- You can add additional rows by clicking on the +Add Row button or by simply using the right click mouse option while on any cell within the table row and then selecting Insert row above or below.

Activity Totals:	\$11,000.00	\$61,000.00	\$6,100.00	\$0.00
-------------------------	--------------------	--------------------	-------------------	---------------

Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Indirect Cost	Item Type
Test	Test	0.00	\$0.00	\$0.00	\$50,000.00	50000	<input checked="" type="checkbox"/>	Direct Cost
admin	none	1.00	\$10,000.00	\$10,000.00	\$10,000.00	10000	<input checked="" type="checkbox"/>	Direct Cost
activity delivery	none	5.00	\$100.00	\$500.00	\$500.00	501	<input checked="" type="checkbox"/>	Direct Cost
travel	none	1.00	\$500.00	\$500.00	\$500.00	500	<input checked="" type="checkbox"/>	Direct Cost
+ Add Row								

- You can remove unwanted rows by simply using the right click mouse option while on any cell within the table row and then selecting Remove row.

Activity Totals:	\$11,000.00	\$61,000.00	\$6,100.00	\$0.00
-------------------------	--------------------	--------------------	-------------------	---------------

Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Indirect Cost	Item Type
Test	Test	0.00	\$0.00	\$0.00	\$50,000.00	50000	<input checked="" type="checkbox"/>	Direct Cost
admin	none	1.00	\$10,000.00	\$10,000.00	\$10,000.00	10000	<input checked="" type="checkbox"/>	Direct Cost
activity delivery	none	5.00	\$100.00	\$500.00	\$500.00	501	<input checked="" type="checkbox"/>	Direct Cost
travel	none	1.00	\$500.00	\$500.00	\$500.00	500	<input checked="" type="checkbox"/>	Direct Cost
		0.00	\$0.00	\$0.00	\$0.00		<input checked="" type="checkbox"/>	Direct Cost
+ Add Row								
<div style="border: 1px solid red; padding: 2px; display: inline-block;"> Remove row </div>								

3.2. Can I create 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.

California Housing and Community Development External User Manual

Chapter 4. How can I submit my application?

Budget Narrative

Enter your budget narrative below.

2

</> H1 H2 H3 B I U ☰ ☷ ☹ ☺ 🔗

1

3 Save Narrative 📄 4

1. Enter Budget Narrative
2. Formatting Tools, including font size, indents, and bullets
3. Save Narrative button
4. Export the Budget Narrative as a PDF

Chapter 4. How can I submit my application?

Once all sections of the Application and Budget are completed you're ready to submit your application.

1. Select the *Grant Application* section for the page and click on your application title.

Application Submission Draft

Grant Application Budget Worksheet

Budget Settings Budget Summary

Multi-Term Budget No Yes

Indirect Costs Not Applicable 0.00 %

\$0.00 Total Direct Costs

\$0.00 Total Indirect Costs

California Housing and Community Development External User Manual

Chapter 5. Accepting and managing my award

[Homepage](#) > [Multi Family Housing Unit](#)

Application Process

Applications	✔ Complete	View Edit
Activities	✔ Complete	Open >
First Stage Submission		Submit

2. Click on the green *Submit* button to submit your application. You will receive a confirmation that you application was successfully submitted.

Activities [Open >](#)

First Stage Submission

Congratulations! Your application has been successfully submitted.

✔ This has been submitted.

Managing my sub-award

Chapter 5. Accepting and managing my award

5.1. How do I receive and accept my award notification?

As an applicant, if my application is approved I 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:

California Housing and Community Development External User Manual

Chapter 5. Accepting and managing my award

Award Notification Letter

Dear Ulysses Grant,

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

Project: HIV Testing Project

Program: HOPWA FY2019

Approval Date: 06/13/2019

Approved Amount: \$800,000.00

Federal Awards: • ORG0012 HOPWA FY19- \$782,000.00




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 the appropriate Award title, or from the Actions column, select *Accept/Decline Award*:

My Awards

Show 10 entries Search:

Grant Title	Award Status	Notification Date	Performance Period	Open Tasks	Actions
Electric Bus Fleet Implementation	Awarded	01/27/2019	1/1/19 - 1/1/20	0	
HOPWA FY2019	Awarded	06/13/2019	6/30/19 - 6/30/20	0	
Workforce Development Program (WDP) Grant - FY 2019	Pending Acceptance		7/3/19 - 7/3/21	0	 Accept/Decline Award

Showing 1 to 3 of 3 entries

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

California Housing and Community Development External User Manual

Chapter 5. Accepting and managing my award

Award Files

Show entries Search:

File Name	File Size	Actions
No files are available for download		

Showing 0 to 0 of 0 entries

4. Review and finalize your budget. Your granting agency may not have awarded you the exact amount you requested. You can request changes if you believe the budgeted items are justified.

California Housing and Community Development External User Manual

Chapter 5. Accepting and managing my award

● DOWNLOAD FILES
● FINALIZE BUDGET
● ATTACH FILES

Please review your awarded budget. Please note that the grantor may have amended your budget, and it is reflected below. If you need to make changes you can request a Grant Amendment before "Request Amendment" at the bottom of this page. Please ensure your accuracy. The grantor will review the amended budget during finalization.

Budget Settings

Multi-Term Budget No Yes ▼

Indirect Costs Not Applicable 0.00 %

Match / Cost Share Not Applicable 0.00 % \$ 0.00

Budget Stage: Awarded

Actions

Budget Summary

\$1,050,000.00 **Total Direct Costs**

\$0.00 **Total Indirect Costs**

\$1,050,000.00 **Total Amount (Direct + Indirect)**

\$0.00 **Match / Cost Share**

\$0.00 **Program Income**

Budget Items

1. Economic development

	Ext Cost	Direct Cost	Ind Cost	Cost Share
Economic development Totals:	\$1,050,000.00	\$1,050,000.00	\$0.00	\$0.00

Activity 1 - Economic development ○

Activity 2 - Economic development ○

Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Item Type
Personnel	Director, Project Manager, Assistant PM	1.00	\$175,000.00	\$175,000.00	\$175,000.00		Direct Cost
Salary	Labor	5000.00	\$50.00	\$250,000.00	\$250,000.00		Direct Cost
Equipment	Truck, Construction Equip.	1.00	\$125,000.00	\$125,000.00	\$125,000.00		Direct Cost
Material	Building Materials	1.00	\$500,000.00	\$500,000.00	\$500,000.00		Direct Cost

[Add Row](#)

5. You can include a narrative in the budget to further explain and justify your expenses. When you are ready to finalize your budget click on *Save Changes* and select *Accept and Continue* at the bottom of the page.

California Housing and Community Development External User Manual

Chapter 5. Accepting and managing my award

Save Changes Discard Changes

Budget Narrative

Enter your budget narrative below.

<> H1 H2 H3 B I U

Build high density low cost transitional housing

Save Narrative

7952 characters remaining

Accept and Continue Decline Award Back

6. If you need to attach files to accept the award, select Upload Files on the following page:

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

Upload File

Award Files

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

Select files for your award approval.

Drag files here or click to select & upload.



Done

California Housing and Community Development External User Manual

Chapter 5. Accepting and managing my award



8. Any uploaded file can be downloaded again, or deleted using the trash icon:

Show entries Search:

File Name	File Size	Actions
Award Notice Place Holder.docx	11.0 KB	 

Showing 1 to 1 of 1 entries Previous Next

9. Select *Finalize and Submit* to send the Program Administrator notification that you have accepted the award.

File Name	File Size	Actions
Award Notice Place Holder.docx	11.0 KB	 

Showing 1 to 1 of 1 entries Previous Next

Note: A popup window will allow you to leave an optional note to the grantor and Program Administrator

California Housing and Community Development External User Manual
Chapter 5. Accepting and managing my award

Accept Award ×

Are you sure you are ready to accept this award? Please ensure you have all necessary budget and documentation completed before sending this award offer for final grantor approval. You may enter an optional note to the awarding pass-through entity:

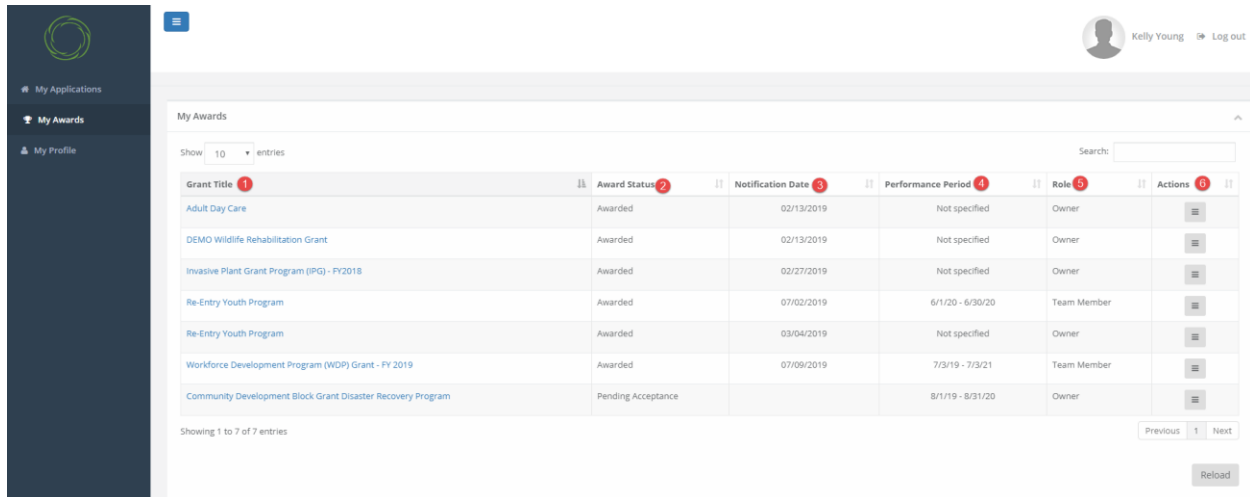
5000 characters remaining.

5.2. How do I manage my awards?

Access to all of your awards and their financial history is available from the My Awards option from the navigation bar.

California Housing and Community Development External User Manual

Chapter 5. Accepting and managing my award



The screenshot shows a user interface for 'My Awards'. The user is logged in as Kelly Young. The dashboard displays a table with 7 entries. The table columns are: Grant Title, Award Status, Notification Date, Performance Period, Role, and Actions. The first row is highlighted. The table data is as follows:

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

1. Grant Title: name of 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 officer reviewed and approved your award
4. Performance Period: the project period as specified by the Program Officer
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: vary by Award status:
 - a. Awarded: Manage Award
 - b. Pending Acceptance: Accept/Decline Award

5.3. What does the award dashboard tell me?

You can click on each grant title to access its Award Dashboard. The Award Dashboard contains:

- Award Detail
- Pending Tasks
- Financial activity

California Housing and Community Development External User Manual

Chapter 5. Accepting and managing my award

Award Detail

Award Dashboard

Award Detail

Subrecipient: Ulysses Grant
Project: Job Incubator
Approval Date: 07/09/2019
Approved amount: \$40,000.00
Total Federal Award: \$0.00
Total Non-Federal Award: \$40,000.00
Total Match: \$10,000.00
Performance period: 07/03/2019 - 07/03/2021

Program: Workforce Development Program (WDP) Grant - FY 2019
Award ID: HXI-082019-001

Buttons: View Budget (2), Submit Financial Report (3), Submit Activity Report (4), Manage Project Team (5)

1. Click here to view Funding Details
2. View Budget: the original budget worksheet
3. Submit a new Financial Report
4. Submit a new Activity Report
5. 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.

Pending Tasks

Pending Tasks

Show 10 entries

Search: 10/01

Task Type (1)	Due Date (2)	Actions (3)
Financial Report Request	10/01/2019	

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

Previous 1 Next

Reload

1. Task Type: Financial or Activity Reports
2. Due Date: when your report is due
3. Actions: submit the report or mark as complete

Financial Activities

These columns can be reorganized by clicking on the column headers.

California Housing and Community Development External User Manual

Chapter 5. Accepting and managing my award

Financial Report ¹	Reporting Period ²	Created By ³	Date Created ⁴	Current Status ⁵	Actions ⁶
Financial Report	05/01/2019 – 05/31/2019	Ulysses Grant	07/09/2019	Approved / Awaiting Payment	
Financial Report	06/01/2019 – 06/30/2019	Ulysses Grant	07/09/2019	Approved / Paid	
Financial Report	07/03/2019 – 07/03/2019	Ulysses Grant	09/16/2019	Pending Approval	
Financial Report	05/01/2019 – 05/31/2019	Ulysses Grant	08/26/2019	Rejected	Review/Resubmit
Financial Report	07/01/2019 – 07/31/2019	Ulysses Grant	07/09/2019	Pending Approval	
Activity Report	09/01/2019 – 09/30/2019	Ulysses Grant	09/16/2019	Approved	

1. Financial Report: type of Report
2. Reporting Period
3. Created by: team member who submitted the report
4. Date Created
5. Current Status:
 - a. Approved/Awaiting Payment: the funding agency has approved the report but has not submitted payment
 - b. Approved/Paid: the funding agency has approved the report and submitted the reimbursement
 - c. Rejected: the funding agency needs more information
 - d. Pending Approval: the report has been submitted and there has been no action by the funding agency
6. Actions:
 - a. Review/Resubmit: if a report has been rejected, the subrecipient will have the opportunity to edit the rejected report and resubmit it.

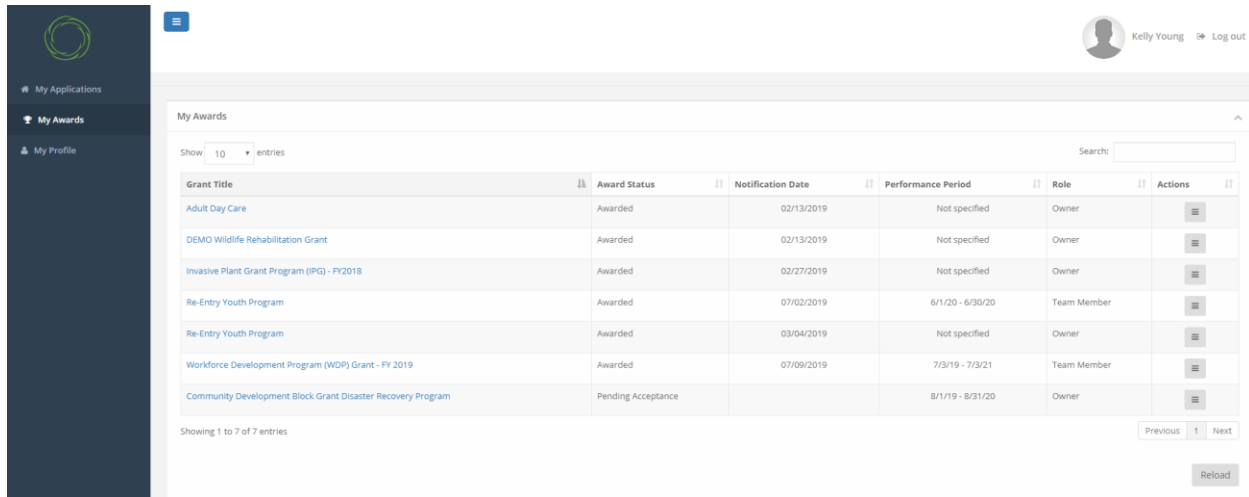
5.4. How will I submit financial reports?

From the Award Dashboard, you can submit a Financial Report directly to the Program Officer.

1. Select *My Awards* from the Navigation bar:

California Housing and Community Development External User Manual

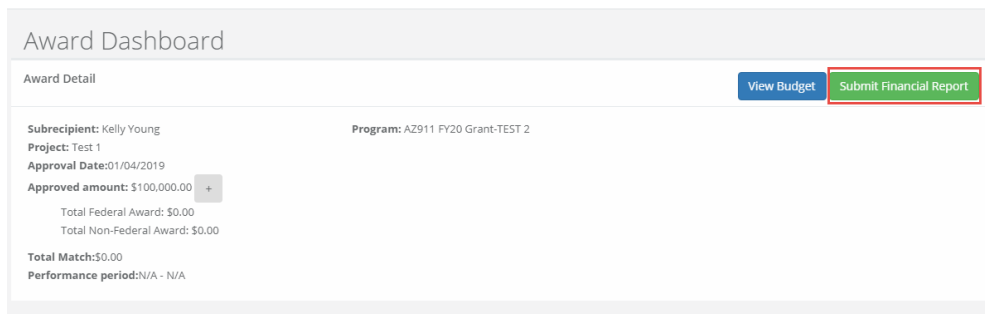
Chapter 5. Accepting and managing my award



The screenshot shows a user interface for managing awards. On the left is a dark sidebar with navigation options: 'My Applications', 'My Awards', and 'My Profile'. The main area is titled 'My Awards' and features a search bar and a table of award entries. The table has columns for Grant Title, Award Status, Notification Date, Performance Period, Role, and Actions. Below the table, it indicates 'Showing 1 to 7 of 7 entries' and includes 'Previous', '1', 'Next', and 'Reload' buttons.

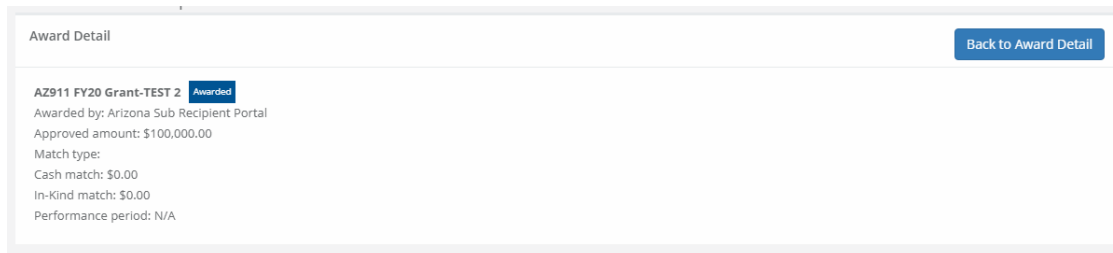
Grant Title	Award Status	Notification Date	Performance Period	Role	Actions
Adult Day Care	Awarded	02/13/2019	Not specified	Owner	[Menu]
DEMO Wildlife Rehabilitation Grant	Awarded	02/13/2019	Not specified	Owner	[Menu]
Invasive Plant Grant Program (IPG) - FY2018	Awarded	02/27/2019	Not specified	Owner	[Menu]
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]

2. Click on *Submit Financial Report*:



The screenshot shows the 'Award Dashboard' with a section for 'Award Detail'. It includes fields for Subrecipient (Kelly Young), Project (Test 1), Approval Date (01/04/2019), and Approved amount (\$100,000.00). There are also buttons for 'View Budget' and 'Submit Financial Report', with the latter being highlighted by a red box.

Note: The Award Detail provides a summary of the award information:



The screenshot shows the 'Award Detail' page for 'AZ911 FY20 Grant-TEST 2'. It displays the award status as 'Awarded' and provides details on the awarding agency (Arizona Sub Recipient Portal), approved amount (\$100,000.00), match type, and performance period (N/A). A 'Back to Award Detail' button is visible in the top right corner.

The Award Financial Overview is not editable, but will update itself depending on the amounts that are submitted in the Financial Report Details. This area is a summary of the total award spent and the total award amount remaining.

California Housing and Community Development External User Manual

Chapter 5. Accepting and managing my 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.			
	Spend	Match	Spend + Match
Award Total Spend	\$ 0.00	\$ 0.00	\$ 0.00
	0.00 %	0.00 %	
Award Remaining	\$ 100,000.00	\$ 0.00	\$ 100,000.00

3. In the Financial Report Details, click inside the Reporting Period text box and provide the dates of the reporting period then click apply:

Financial Report Details

Reporting Period: *

07/01/2019 - 08/24/2019

07/01/2019 08/24/2019 **Apply** Cancel

< Jul 2019 Aug 2019 >

Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
30	1	2	3	4	5	6	28	29	30	31	1	2	3
7	8	9	10	11	12	13	4	5	6	7	8	9	10
14	15	16	17	18	19	20	11	12	13	14	15	16	17
21	22	23	24	25	26	27	18	19	20	21	22	23	24
28	29	30	31	1	2	3	25	26	27	28	29	30	31
4	5	6	7	8	9	10	1	2	3	4	5	6	7

4. Enter the amounts in the appropriate category under the Spend and Match columns. Spend is the amount of grant funds spent. Match is the amount of match funds spent. Subrecipients can only report in categories they are awarded in. If a category is grayed out, and you would like to request reimbursement in that category, a budget modification is needed:

California Housing and Community Development External User Manual Chapter 5. Accepting and managing my award

Financial Report Details					
Reporting Period: *					
07/01/2019 - 08/24/2019					
Category	Spend	Match	Spend + Match	Award Remaining	
1. Personnel	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	
2. Fringe Benefits	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	
3. Travel	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	
4. Equipment	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	
5. Supplies	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	
6. Contractual	\$ 0.00	\$ 0.00	\$ 0.00	\$ 275,000.00	
7. Construction	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	
8. Other	\$ 0.00	\$ 0.00	\$ 0.00	\$ 10,000.00	
Program Income	Received		Expended		
	\$ 0.00	\$ 0.00			
Report Total	Spend		Match		Spend + Match
	\$ 0.00	\$ 0.00	\$ 0.00		
	0.00	%	0.00	%	

Note: 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:

California Housing and Community Development External User Manual Chapter 5. Accepting and managing my award

Reporting Period:

Category	Spend	Match	Spend + Match	Award Remaining
1. Personnel	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
2. Fringe Benefits	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
3. Travel	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
4. Equipment	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
5. Supplies	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
6. Contractual	\$ 50,000.00	\$ 0.00	\$ 50,000.00	\$ 225,000.00
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 %		

5. Once complete, check *Reimbursement Requests*. The box will auto populate with the amount from the spend column. If different, define the amount you are requesting for reimbursement.

Category	Spend	Match	Spend + Match	Award Remaining
1. Personnel	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
2. Fringe Benefits	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
3. Travel	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
4. Equipment	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
5. Supplies	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
6. Contractual	\$ 50,000.00	\$ 0.00	\$ 50,000.00	\$ 225,000.00
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 %		

Reimbursement Request*

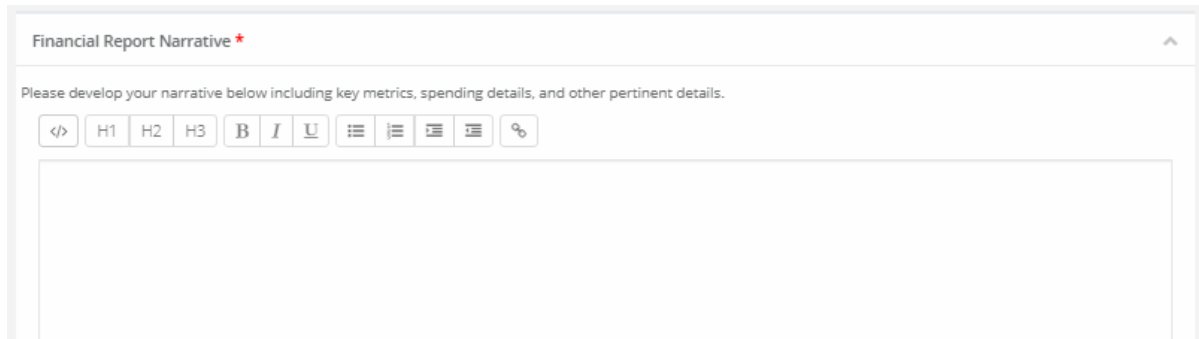
This is my final report

6. When this is the final report and the final request for reimbursement, check the box *This is my final report*. The grant closeout process will automatically begin once this box is checked and submitted.

California Housing and Community Development External User Manual

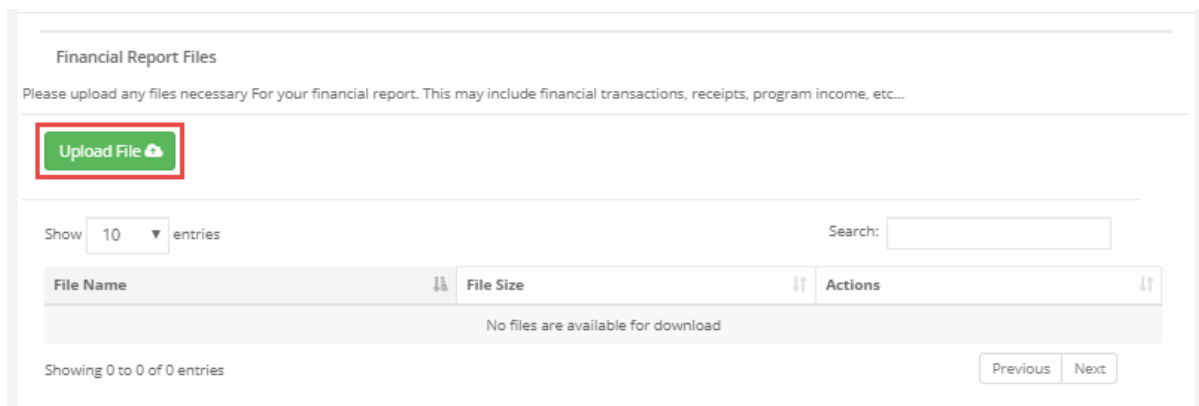
Chapter 5. Accepting and managing my award

7. Include any spending details and a brief description about the reporting period's expense in the Financial Report Narrative:



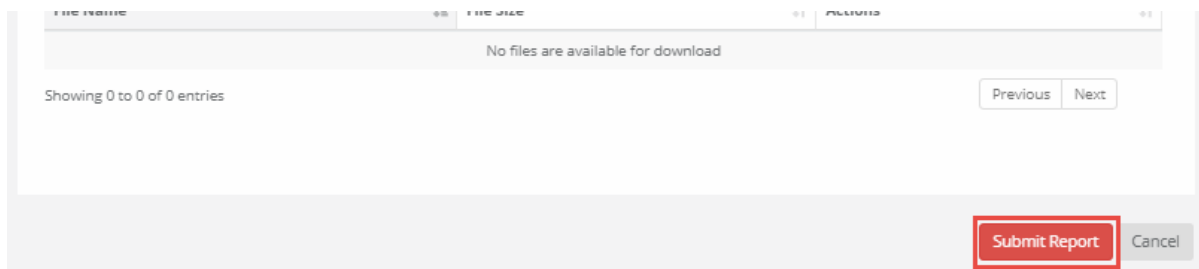
The screenshot shows a form titled "Financial Report Narrative" with a red asterisk. Below the title is a text area with a rich text editor toolbar containing icons for undo, redo, bold, italic, underline, bulleted list, numbered list, link, and unlink. The text area is currently empty.

8. You can also upload any documents, including PDFs and scanned images, to the Financial Report. Click on *Upload Files* to attach a document:



The screenshot shows the "Financial Report Files" section. It includes a green "Upload File" button with a cloud icon, highlighted with a red box. Below the button is a search bar and a table with columns for "File Name", "File Size", and "Actions". The table is currently empty, displaying "No files are available for download".

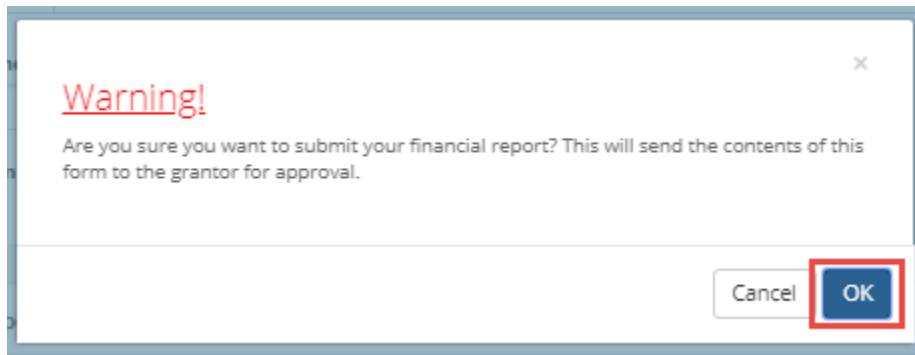
9. When you are finished, click *Submit Report*.



The screenshot shows the bottom of the "Financial Report Files" section. It includes a red "Submit Report" button and a grey "Cancel" button, both highlighted with red boxes. The table above is still empty, displaying "No files are available for download".

10. Click on the warning page to send the report to the funding agency:

California Housing and Community Development External User Manual Chapter 5. Accepting and managing my award



Note: You will be taken back to the Award Detail page, where the Financial Report will now be recorded under the Financial Activities:

The screenshot shows a table titled "Financial Activities" with a search bar and a "Show 10 entries" dropdown. The table has five columns: "Financial Report", "Reporting Period", "Date Created", "Current Status", and "Actions". There is one row of data.

Financial Report	Reporting Period	Date Created	Current Status	Actions
Financial Report	06/01/2019 -- 06/30/2019	07/09/2019	Pending Approval	

Showing 1 to 1 of 1 entries

The Financial Report status will change, depending on the approver's actions:

The screenshot shows the same "Financial Activities" table, but now with three rows of data.

Financial Report	Reporting Period	Date Created	Current Status	Actions
Financial Report	05/01/2019 -- 05/31/2019	07/09/2019	Approved / Awaiting Payment	
Financial Report	06/01/2019 -- 06/30/2019	07/09/2019	Approved / Paid	
Financial Report	07/01/2019 -- 07/31/2019	07/09/2019	Pending Approval	

Showing 1 to 3 of 3 entries

1. Pending Approval: The Financial Report has not been reviewed
2. Approved/Awaiting Payment: The Financial Report has been reviewed and is waiting for payment
3. Approved/Paid: The reimbursement is complete.

5.5. How will I submit activity reports?

1. From My Awards, select the grant title of the award:

California Housing and Community Development External User Manual

Chapter 5. Accepting and managing my award

The screenshot shows a table titled "My Awards" with a search bar containing "WDP". The table has columns for Grant Title, Award Status, Notification Date, Performance Period, Role, and Actions. The first row is highlighted with a red box.

Grant Title	Award Status	Notification Date	Performance Period	Role	Actions
Workforce Development Program (WDP) Grant - FY 2019	Awarded	07/09/2019	7/3/19 - 7/3/21	Owner	[Menu Icon]

Showing 1 to 1 of 1 entries (filtered from 5 total entries)

Previous 1 Next

Reload

2. At the top right, select *Submit Activity Report*:

The screenshot shows the "Award Dashboard" for a specific award. At the top right, there are four buttons: "View Budget", "Submit Financial Report", "Submit Activity Report", and "Manage Project Team". The "Submit Activity Report" button is highlighted with a red box.

Award Detail

View Budget Submit Financial Report **Submit Activity Report** Manage Project Team

Subrecipient: Ulysses Grant
Program: Workforce Development Program (WDP) Grant - FY 2019
Project: Job Incubator
Approval Date: 07/09/2019
Award ID: HXI-082019-001
Approved amount: \$40,000.00 +
Total Federal Award: \$0.00
Total Non-Federal Award: \$40,000.00

3. Complete the following form and attach any pertinent files:

The screenshot shows the "Activity Report" form. It has a "Reporting Period:" field with a red asterisk. Below it is a text area for the "Report Narrative:" with a red asterisk and a rich text editor toolbar. At the bottom right, there is a "Submit Report" button highlighted with a red box.

Activity Report

Reporting Period: *

Please develop your narrative below including key metrics, and other pertinent details.

Report Narrative: *

[Rich Text Editor]

Submit Report

4. Select *Submit Report*:

California Housing and Community Development External User Manual

Chapter 5. Accepting and managing my award

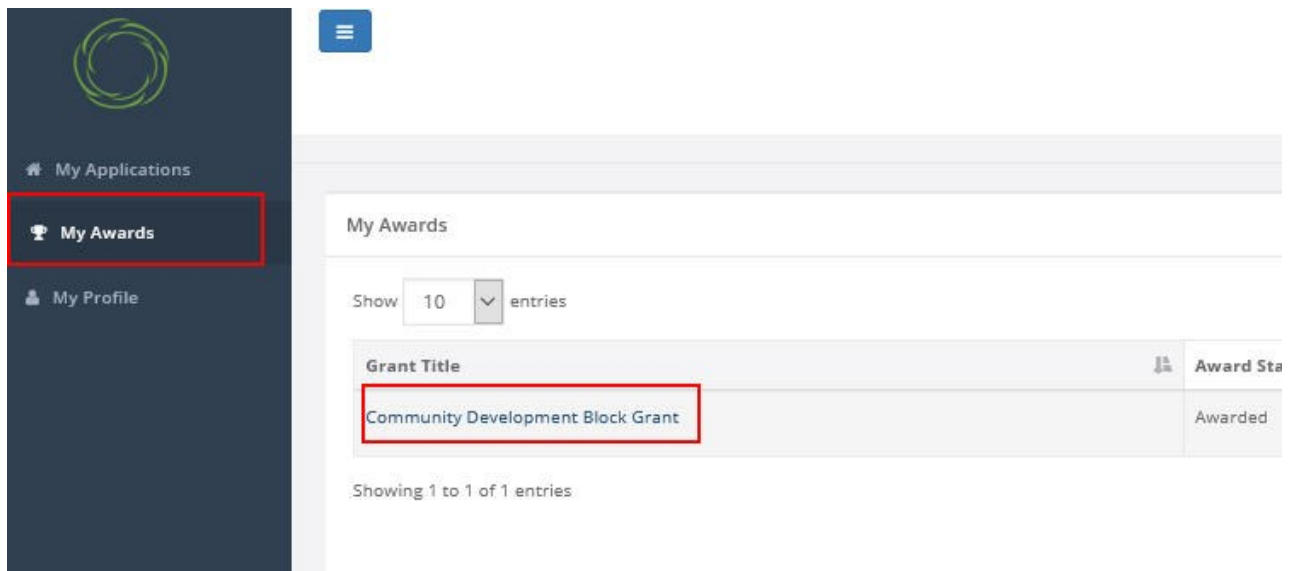
Previous Next

Submit Report

Cancel

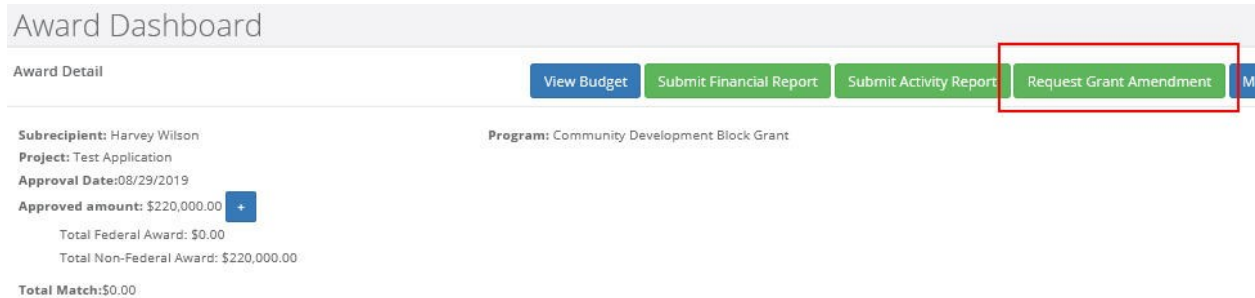
5.6. How will I submit a grant amendment?

1. To submit a grant amendment click on the *My Awards* section of the portal and select the award you want to amend.



The screenshot shows a user interface with a dark sidebar on the left containing navigation options: 'My Applications', 'My Awards' (highlighted with a red box), and 'My Profile'. The main content area is titled 'My Awards' and includes a 'Show 10 entries' dropdown. Below this is a table with two columns: 'Grant Title' and 'Award Sta'. A single entry is visible: 'Community Development Block Grant' (highlighted with a red box) with the status 'Awarded'. At the bottom of the table, it says 'Showing 1 to 1 of 1 entries'.

2. Select the option to *Request Grant Amendment*.



The screenshot shows the 'Award Dashboard' for a specific award. It features a row of action buttons: 'View Budget', 'Submit Financial Report', 'Submit Activity Report', and 'Request Grant Amendment' (highlighted with a red box). Below the buttons, the award details are listed: 'Subrecipient: Harvey Wilson', 'Project: Test Application', 'Approval Date: 08/29/2019', and 'Approved amount: \$220,000.00'. A plus sign icon is next to the approved amount. Further down, it shows 'Total Federal Award: \$0.00' and 'Total Non-Federal Award: \$220,000.00'. At the bottom, it states 'Total Match: \$0.00'.

3. Complete the basic award details and select save and continue.

California Housing and Community Development External User Manual

Chapter 5. Accepting and managing my award

Grant Amendment

AWARD DETAILS
FINANCIAL INFORMATION
ATTACH FILES

Please edit the appropriate information below.

Organization Name:

Project Name:

EIN:

Performance Period End:

[Save and Continue](#)

- If applicable, check the box *This amendment includes a financial change*. This will allow you to make adjustments to your budget that will be submitted for approval.

AWARD DETAILS
FINANCIAL INFORMATION
ATTACH FILES

This amendment includes a financial change

Budget Settings

Multi-Term Budget: No Yes

Indirect Costs: %

Match / Cost Share: % \$

Budget Stage: Post-Award

Actions:

Budget Summary

\$45,000.00	Total Direct Costs
\$0.00	Total Indirect Costs
\$45,000.00	Total Amount (Direct + Indirect)
<hr/>	
\$0.00	Match / Cost Share
\$0.00	Program Income

Budget Items

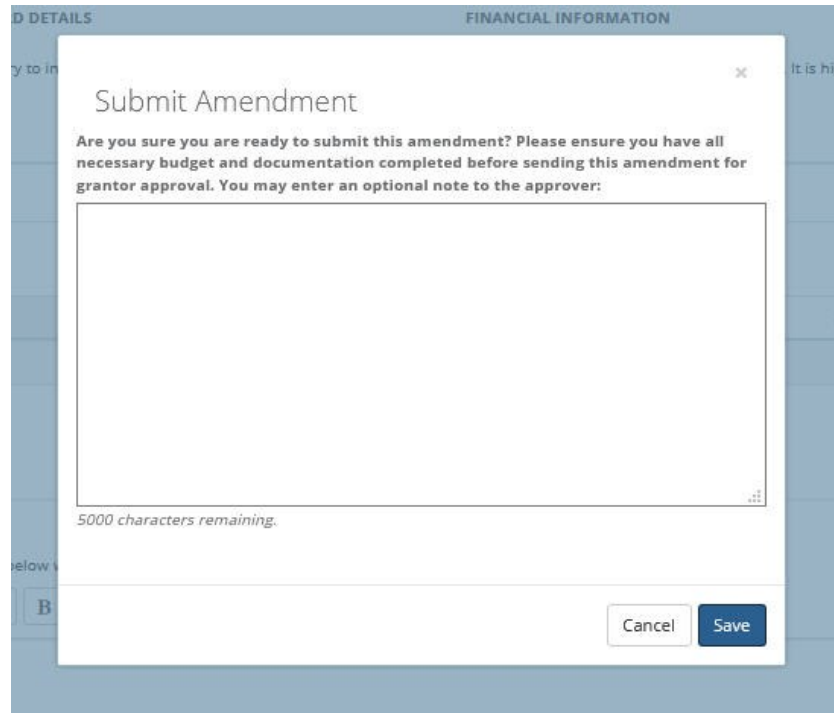
1. Administrative and Legal Expenses

	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

[Add Row](#)

California Housing and Community Development External User Manual

Chapter 5. Accepting and managing my award

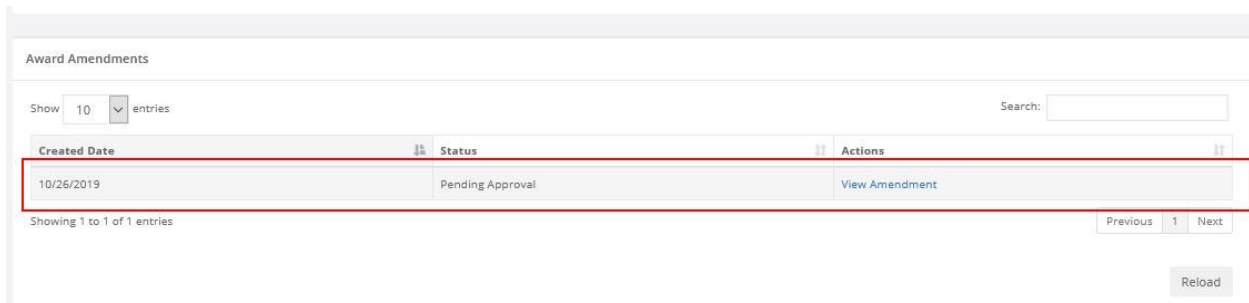


The image shows a 'Submit Amendment' dialog box. At the top, it asks, 'Are you sure you are ready to submit this amendment? Please ensure you have all necessary budget and documentation completed before sending this amendment for grantor approval. You may enter an optional note to the approver:'. Below this is a large text area for a note, with a character count at the bottom: '5000 characters remaining.'. At the bottom right of the dialog are 'Cancel' and 'Save' buttons.

Note: You will be notified that your amendment was successfully submitted.



Note: You can locate the status of your Amendment in the *Award Amendments* section.



The image shows a table titled 'Award Amendments'. It has columns for 'Created Date', 'Status', and 'Actions'. A single row is visible, with a red box highlighting it. The row contains the date '10/26/2019', the status 'Pending Approval', and the action 'View Amendment'. The table also includes a search bar, a 'Show 10 entries' dropdown, and pagination controls.

Created Date	Status	Actions
10/26/2019	Pending Approval	View Amendment

California Housing and Community Development External User Manual
Glossary of Terms

Glossary of Terms

Term	Definition
Activity Report	A summary of activities performed over a given period of time (usually defined by Grantor) and submitted for review by the Grantor.
Amendment	A written request to modify an awarded grant. Grant amendments may include budget modifications, changes to key personnel, no-cost extensions, and carryover budgets.
Amendment Narrative	A written description that details your request for a grant amendment.
Applicant	A registered grant applicant user who is working on or submitting applications on behalf of an organization, such as a state government, nonprofit organization, private business, or any other type of institution.
Application	The specific set of forms, documents, and attachments that comprise an applicant's submission to a grant opportunity.
Application Denied	Application was not accepted for funding.
Application Submission	Submitting a completed application to an organization for funding.
Award	Financial assistance that provides support or stimulation to accomplish a public purpose.
Award Notification Letter	Official notification from Grantor that recipient has been accepted and outlines the award details.
Award Dashboard	In Portal, the Award Dashboard 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 indented 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.

**California Housing and Community Development External User Manual
Glossary of Terms**

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, and which budget items will be covered by the grant and which ones will be covered by matching funds (e.g., 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 automatically 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.
California Housing and Community Development (CA HCD)	The California Department of Housing and Community Development, hereinafter referred to as CA HCD, is a department within the California Business, Consumer Services and Housing Agency that develops housing policy and building codes and administers programs that provide grants and loans.
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	This field can be calculated in different ways based on your budget settings. If included as a percentage, you can check or uncheck this field to include it in your total Cost Share. If included as Itemized, you can put any amount desired for this item in the Cost Share field. If included as Not Applicable, you can mark this budget item as Cost Share and the amount entered in the Cost field will be included in your total Cost Share.
Data Universal Numbering System or DUNS	The nine-digit number established and assigned by Dun and Bradstreet, Inc. (D&B) to uniquely identify entities. A non-Federal entity is required to have a DUNS number in order to apply for, receive, and report on a Federal award. A DUNS number may be obtained from D&B by telephone (currently 866-705-5711) or the Internet (currently at http://fedgov.dnb.com/webform Click to View Exit Disclaimer)
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.
Draft	This is when your application is still in progress and has not yet been submitted.
eCivis Portal Account	An online service which allows interested applicants to create a free account so they can save, collaborate, and apply for program solicitations.

**California Housing and Community Development External User Manual
Glossary of Terms**

eCivis Grants Network	eCivis Grants Network is a SaaS grant management system used by state, local, and tribal governments.
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	A report that tracks spending and reimbursement requests that the subrecipient will send to the grantor from Portal. Another name that is related is the Program Progress report (see Program Progress Report).
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
Granting Agency	Organization, institution, or agency providing a sum of money for a particular purpose or goal. This is often referred to as Grantor.
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 Grants Network, this is an organization who is offering a program solicitation.
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
Login Credentials	User ID and Password associated with a Portal account. These credentials are used to allow access to the Portal Account.
My Applications Page	This is the main homepage in the portal account. This page allows users to select their applications, view their awards, and access their profile.
My Awards	Access to all the programs that you have been awarded.
My Profile	Access to your profile information.
Negotiated Rate	This should be used if you have negotiated an indirect cost rate with the federal agency you are applying to.
Notification Date	The date the program officer reviewed and approved your award.

California Housing and Community Development External User Manual
Glossary of Terms

Not Applicable	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).
Pass-through-funding	Funds issued by a federal agency to a state agency or institution that are then transferred to other state agencies, units of local government, or other eligible groups per the award eligibility terms. The state agency or institution is referred to as the "prime recipient" of the pass-through funds. The secondary recipients are referred to as "subrecipients." The prime recipient issues the sub awards as competitive or noncompetitive as dictated by the prime award terms and authorizing legislation.
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 awarding agency sponsorship begins and ends.
Post-Award	When a grant is awarded implementation of the grant begins, reporting progress is tracked, and completion of the closeout requirements.
Program Administrator	The individual responsible for planning, implementing, and evaluating the grant program.
Program Income	Sum of program income line items listed in the Program Income section
Program Officer	The person who is responsible for overseeing program development, seeking grants and submitting proposals, managing projects and overseeing budgets.
Program Solicitation	An available funding opportunity.
Portal Profile	Information that is entered by Portal user, which will be used when submitting 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 the Portal Account requesting reimbursement from the Grantor for grant related expenses.
Role	This defines who the user is in a Portal account.
Owner	Owner who submitted the application and is tracking and managing the award.
Solicitations Listings Page	A webpage on CA HCD website showing all programs available for funding.
Spending Report	A report which shows spending in the grant budget categories.

California Housing and Community Development External User Manual
Glossary of Terms

Subrecipient	Subrecipient means a non-Federal entity that receives a sub award from a pass-through entity to carry out part of a Federal program; but does not include an individual that is a beneficiary of such program. A subrecipient may also be a recipient of other Federal awards directly from a Federal awarding agency.
Sub-award	An award provided by a pass-through entity to a subrecipient for the subrecipient to carry out part of a Federal award received by the pass-through entity. It does not include payments to a contractor or payments to an individual that is a beneficiary of a Federal program. A sub-award may be provided through any form of legal agreement, including an agreement that the pass-through entity considers a contract.
Team Member	Not the original applicant. This is a user added to a Portal Account to assist and collaborate on the grant program. These people are invited to help track the award and submit reports.
Total Direct Costs	Sum of all Direct Cost 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
Title	The name of the budgeted item.
Under Review	Grant application is received by granting agency and is being reviewed.