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GrAAM Job Aids

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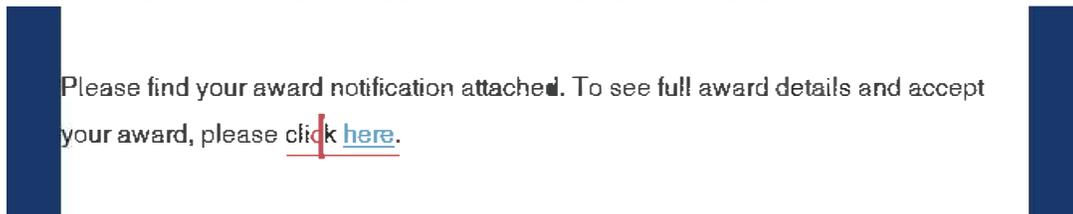
# 1. Accepting an Award

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:



- 1) Click on the link to Portal at the bottom of the email notification:



- 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:

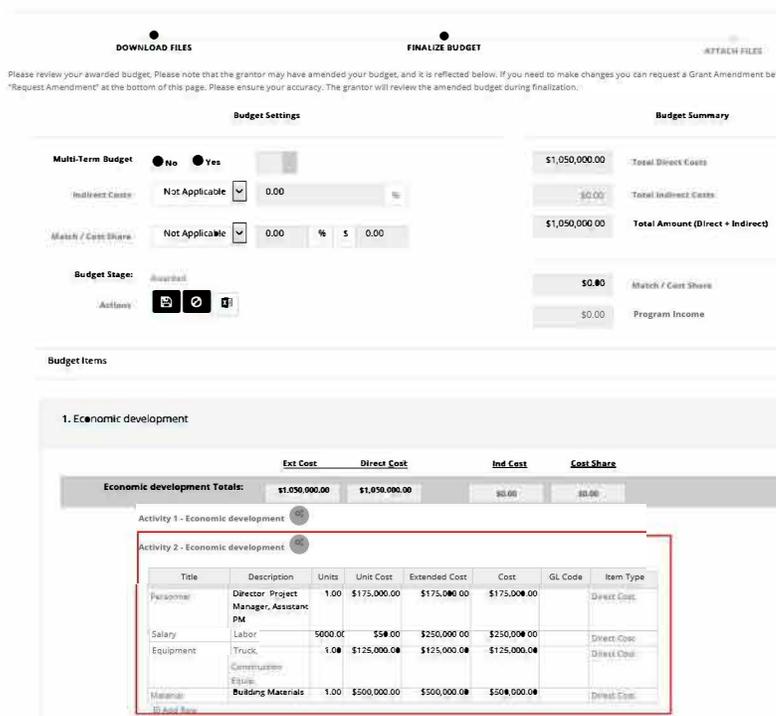
Grant Title	Award Status	Notification Date	Performance Period	Open Tasks	Actions
Electric Bus Fleet Implementation	Awarded	01/27/2019	1/1/19 - 1/1/20		
HOPWA FY2019	Awarded	06/13/2019	6/30/19 - 6/30/20		
Workforce Development Program (WDP) Grant - FY 2019	Pending Acceptance		7/3/19 - 7/3/21		Accept/Decline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

Showing 1 to 3 of 3 entries

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



4) Review your budget. Your budget may have been adjusted.



5) You can include a narrative in the budget.

6) Select "Accept and Continue" at the bottom of the page.

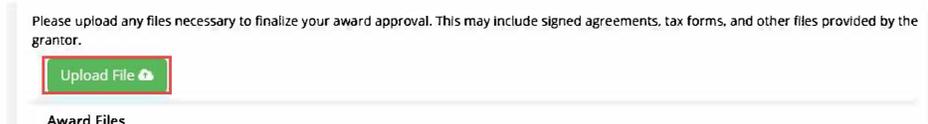
If you plan to decline your award offer, click "Decline Award."

If you would like to request a budget change before accepting, click "Request Budget Change." This will send a request to the grantor and you should expect an updated Award Notification to accept:

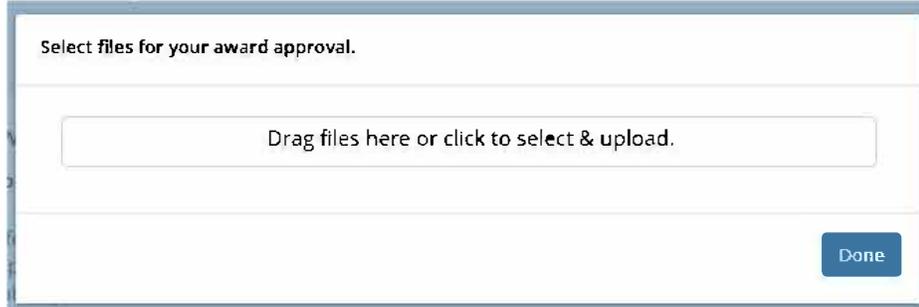
8000 characters remaining



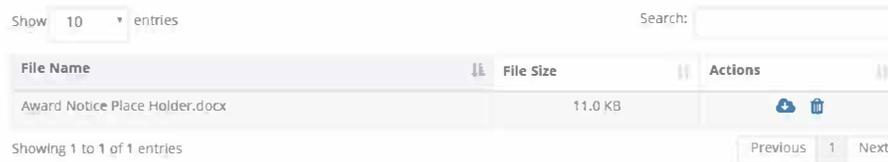
7) If you need to attach files to accept the award, select Upload Files on the following page:



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



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

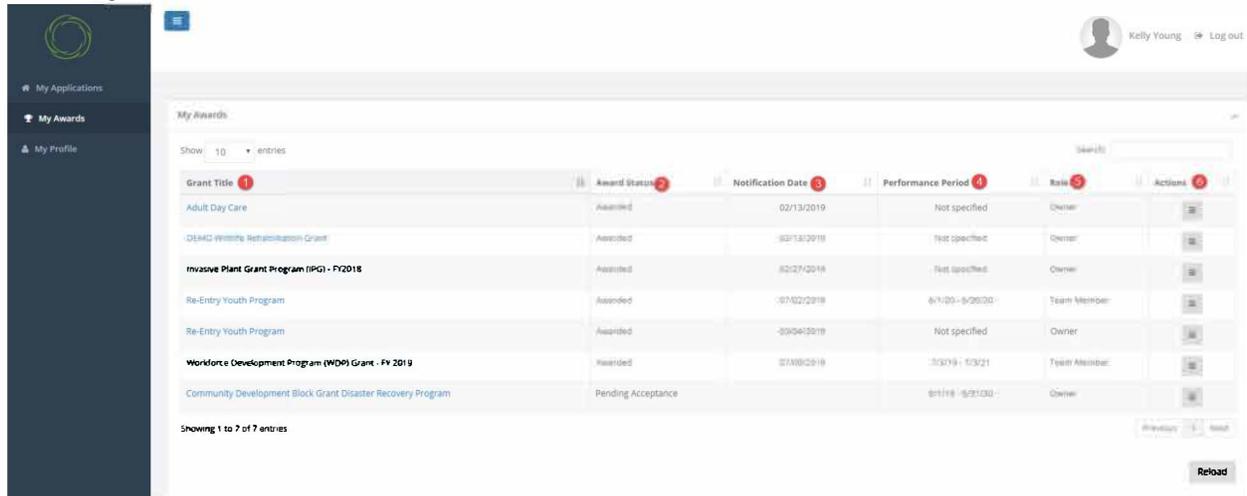


8) Select *Finalize and Submit* to send the Program Administrator notification that you have accepted the award. You can also leave an optional note to the grantor and Program Administrator:



## 2. Accessing your Awards

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



The screenshot shows a web application interface for 'My Awards'. On the left is a dark navigation bar with 'My Awards' selected. The main content area displays a table of award entries. The table has columns for Grant Title, Award Status, Notification Date, Performance Period, Role, and Actions. The first row is highlighted in blue. Below the table, it says 'Showing 1 to 7 of 7 entries'. At the bottom right, there is a 'Reload' button.

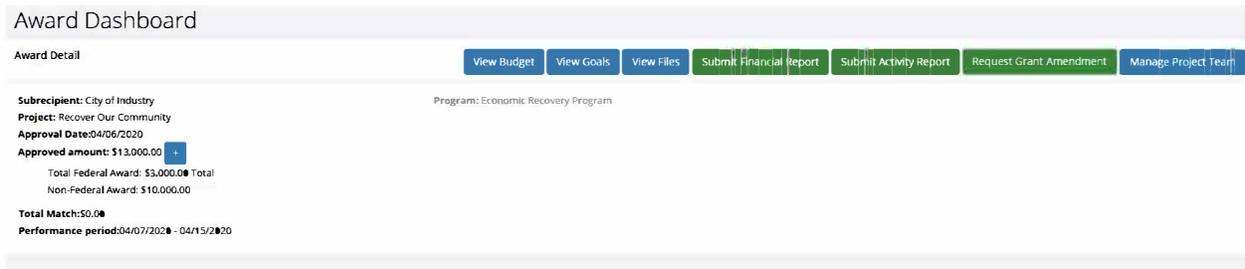
Grant Title	Award Status	Notification Date	Performance Period	Role	Actions
Adult Day Care	Awarded	02/13/2019	Not specified	Owner	[Icon]
DEMG Writing Retention Grant	Awarded	02/13/2019	Not specified	Owner	[Icon]
Invasive Plant Grant Program (IPG) - FY2018	Awarded	02/27/2018	Not specified	Owner	[Icon]
Re-Entry Youth Program	Awarded	07/02/2018	6/1/20 - 9/30/20	Team Member	[Icon]
Re-Entry Youth Program	Awarded	09/04/2018	Not specified	Owner	[Icon]
Workforce Development Program (WDP) Grant - FY 2019	Awarded	07/09/2018	7/3/19 - 6/30/21	Team Member	[Icon]
Community Development Block Grant Disaster Recovery Program	Pending Acceptance		8/1/18 - 6/30/20	Owner	[Icon]

1. **Grant Title:** Name of the program.
2. **Award Status:**
  - **Awarded:** You have accepted the award.
  - **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:**
  - **Owner:** You submitted the application and are tracking and managing the award.
  - **Team Member:** You are not the original applicant but were invited to help track the award and submit reports.
6. **Actions:** Varies by award status:
  - **Awarded:** Manage Award
  - **Pending Acceptance:** Accept/Decline Award

## 3. Navigating your Award Management Tools

You can click on each grant title to access its Award Dashboard. The Award Dashboard contains: Award Detail, Pending Tasks, Financial Activity, and Award Detail.

### 3.1. Award Detail Section



1. Click + to view Funding Details.
2. **View Budget:** View your budget.
3. **View Goals:** View your applicants goals
4. **View Files:** The grantor has attached the following files for you to download and view.
5. **Submit Financial Report:** Submit a new Financial Report.
6. **Submit Activity Report:** Submit a new Activity Report.
7. **Request Grant Amendment:** Request a grant amendment.
8. **Manage Project Team:** 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.

### 3.2. Pending Tasks Section

Any Special Conditions will appear in the pending tasks section.



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

### 3.3. Financial Activities Section

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

Financial Report	Reporting Period	Created by	Date Created	Current Status	Actions
Financial Report	02/01/2019 - 02/28/2019	Ulysses Grant	02/06/2019	Approved / Awaiting Payment	
Financial Report	06/01/2018 - 06/30/2018	Ulysses Grant	06/06/2018	Approved / Paid	
Financial Report	02/01/2018 - 02/28/2018	Ulysses Grant	02/06/2018	Pending Approval	
Financial Report	02/01/2018 - 02/28/2018	Ulysses Grant	02/06/2018	Rejected	Review/Resubmit
Financial Report	02/01/2018 - 02/28/2018	Ulysses Grant	02/06/2018	Pending Approval	
Activity Report	02/01/2018 - 02/28/2018	Ulysses Grant	02/06/2018	Approved	

1. **Financial Report:** Type of report
2. **Reporting Period:** Date range of items in the report.
3. **Created by:** Team member who submitted the report.
4. **Date Created:** Date on which the report was saved.
5. **Current Status:**
  - **Approved/Awaiting Payment:** the funding agency has approved the report but has not submitted payment.
  - **Approved//Paid:** the funding agency has approved the report and submitted the reimbursement.
  - **Rejected:** The funding agency needs more information.
  - **Pending Approval:** The report has been submitted, and there has been no action by the funding agency.
6. **Actions:**
  - **Review/Resubmit:** If a report has been rejected, the applicant will have the opportunity to edit the rejected report, and resubmit it.

## 4. Procedure: Reimbursement Requests

### Purpose

The purpose of this procedure is to instruct DCA subrecipients how to submit reimbursement requests for grants using the GrAAM portal.

### Key Instructions

1. Begin by logging into your [Portal](#) account. Using the **Navigation Panel** on the left side of the window, select **My Awards**. Following, select the award you are submitting a request for and this will open the **Award Dashboard**. *Note: If you are an awardee of a grant that has a pre-defined schedule for reimbursement requests, you will access the request form from the 'Pending Tasks' portion of the dashboard located in the lower third of the below screenshot.*

**Award Dashboard**

Award Detail

View Budget View Goals View Files Submit Financial Report Submit Activity Report Manage Project Team

Subrecipient: Atlanta Housing Organization Program: Test CDBG DR HRRP  
 Project: Atlanta Housing Project Award ID: 98765  
 Approval Date: 12/22/2020 EIN: 12-3456789  
 Approved amount: \$0.00 +  
 Total Federal Award: \$55,000.00  
 Total Non-Federal Award: \$0.00  
 Total Match: \$0.00  
 Performance period: 01/01/2021 - 01/01/2022

Pending Tasks

Show 10 entries Search:

2. Next, select "Submit Financial Report". This will lead to the Financial Report screen. On this screen, input the reporting period and the necessary financial information.

Reporting Period: \*

Category	Spend	Match	Spend + Match	Award Remaining
1. Administrative and Legal Expenses	\$ 0.00	\$ 0.00	\$ 0.00	\$ 1,000.00
2. Demolition and Removal	\$ 0.00	\$ 0.00	\$ 0.00	\$ 13,000.00
3. Site Work	\$ 0.00	\$ 0.00	\$ 0.00	\$ 5,000.00
4. Relocation Expenses and Payments	\$ 0.00	\$ 0.00	\$ 0.00	\$ 5,000.00
Program Income	Received \$ 0.00	Expended \$ 0.00		
Report Total	Spend \$ 0.00	Match \$ 0.00	Spend + Match \$ 0.00	
	0.00 %	0.00 %		

Reimbursement Request

This is my final report

- 3. Following, select the checkbox that reads "Reimbursement Request". Once the checkbox is selected, a field will populate to input the amount needing to be reimbursed.

Reimbursement Request\*

\$ 0.00

This is my final report

- 4. Afterwards, the user can input a narrative to provide additional information such as key metrics and pertinent details.

Financial Report Narrative \*

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

</> H1 H2 H3 B I U [List Icons]

8000 characters remaining

- 5. Next, upload any supporting documentation and click Submit. The reimbursement request has now been submitted and will be pending review and approval by DCA.

Financial Report Files

Please upload any files necessary For your financial report. This may include financial transactions, receipts, program income, etc...

Upload File

Show 10 entries Search:

File Name	File Size	Actions
No files are available for download		

Showing 0 to 0 of 0 entries Previous Next

Submit Report Cancel

6. Once the reimbursement request has been approved, you will receive an email from eCivis Support notifying you of your approval. *Note: If your reimbursement is not approved, you will receive a task for edits or further information in the 'Pending Tasks' section of the Award Dashboard.*



Your Financial Report for the following program has a response:

**Title:** Test CDBG DR HRRP

**Financial Report:** 01/01/2021 - 04/30/2021

**Status:** Approved

**Review Comment:**

We are evaluating your reimbursement request. It is currently with our financial department.

You may view your Financial Report [here](#)

Sincerely,

*eCivis Support Team*

[support@ecivis.com](mailto:support@ecivis.com)

(877) 232-4847, option 2, 8am-5pm PT

## 5. Procedure: Submitting an Activity Report

### Purpose

The purpose of this procedure is to instruct DCA subrecipients how to submit activity reports for grants using the GrAAM portal.

### Key Instructions

1. Begin by logging into your GrAAM [Portal](#) account. Using the **Navigation Panel** on the left side of the window, select **My Awards**. Following, select the award you are submitting a draw request for and this will open the **Award Dashboard**.

The screenshot shows the eCivis GrAAM portal interface. On the left, a dark navigation panel contains 'My Applications', 'My Awards' (highlighted with a red box), and 'My Profile'. The main content area is titled 'Award Dashboard' and features a horizontal menu with buttons: 'View Budget', 'View Goals', 'View Files', 'Submit Financial Report', 'Submit Activity Report', 'Request Grant Amendment', 'Award Closeout', and 'Manage Project Team'. Below this menu, award details are displayed for 'Subrecipient: City of Blue Ridge', 'Project: REBA FY 21 Award', 'Approval Date: 03/24/2021', 'Approved amount: \$1,000,000.00', 'Total Federal Award: \$1,000,000.00', 'Total Non-Federal Award: \$0.00', 'Total Match: \$10,000,000.00', and 'Performance period: 03/23/2021 - 03/23/2026'. A 'Pending Tasks' section below shows a table with one entry: 'Activity Report Request' with a due date of '09/23/2021'.

2. Next, click the **Submit Activity Report** button. This will lead to the Financial Report screen.

This screenshot is identical to the previous one, but the 'Submit Activity Report' button in the horizontal menu is highlighted with a red box, indicating the next step in the procedure.

**Note:** In the GrAAM system, an Activity Report is the same thing as an accomplishment or status report.

3. You may either select a date from the drop-down list and click the **Create Report** button or click the **Continue with New Report** button.

Would you like to use an existing activity report, or create a new report? ✕

Pending Activity Report Requests:

Due Date:

**Note:** In certain DCA grant programs, the program has defined a set of pre-established Activity Report submission dates. These appear as tasks on the grant home page and will appear in the drop-down list on this pop-up window. If the program has not established a schedule for Activity Reports, you may submit them as required in accordance with program-specific guidance.

- On Activity Report screen, summary information about your award is found at the top of the page. You will need to enter the period covered by this Activity Report in the **Reporting Period** field. Once you have selected the beginning and ending dates, click the green **Apply** button.

The screenshot shows the 'Activity Report' page in the eCivis system. At the top, there is a navigation menu with 'My Applications', 'My Awards', and 'My Profile'. The user is identified as Rick Thompson. The main content area is titled 'Activity Report' and includes an 'Award Detail' section with the following information:

- TEST - REBA (Regional Economic Business Assistance) FY2021** (Awarded)
- Awarded by: Georgia Department of Community Affairs
- Approved amount: \$1,000,000.00
- Match type: Cash
- Cash match: \$10,000,000.00
- Performance period: 03/23/2021 - 03/23/2026

Below the award details is the 'Activity Report' section. The 'Reporting Period' field is highlighted with a red box and contains the date '03/28/2021'. A calendar pop-up is displayed, showing the months of March and April 2021. A red callout box points to the calendar with the text: 'Select the beginning and ending dates of the reporting period by clicking on the appropriate dates in the pop-up calendar'.

- Enter your Activity Report narrative using the Report Narrative field. You may enhance the formatting of your narrative using the formatting toolbar on top of this field.

This screenshot shows the 'Activity Report' page with the 'Reporting Period' field updated to '03/28/2021 - 04/07/2021'. Below this is the 'Report Narrative' field, which includes a rich text formatting toolbar. A red callout box points to the toolbar with the text: 'Rich text formatting is possible using the formatting toolbar.' Below the toolbar is a large text area for entering the narrative. Another red callout box points to this area with the text: 'Enter status report details in this window. Text may be created outside GrAAM and pasted into this window, if you prefer.' At the bottom of the page, there is a section for 'Activity Report Metrics' with the instruction: 'Please enter metrics to describe progress on your goals.'

**Note:** You are able to create the narrative outside of GrAAM (e.g., create the narrative in Microsoft Word) and paste it into this field, if you prefer.

6. Enter **Activity Report Metrics** in the fields provided. These metrics will vary by program. The goals for your specific program are found in the parentheses after the enterable fields.

**Note:** Not all programs require the entry of metrics.

7. Upload any supporting documentation and click **Submit**. The Activity Report request has now been submitted and will be pending review and approval by DCA.

8. Once the Activity Report has been approved, you will receive an email from eCivis Support notifying you of your approval. *Note: If your Activity Report is not approved, you will receive a task for edits or further information in the "Pending Tasks" section of the Award Dashboard. The status of the Activity Report can be viewed in the "Award Activities" section of the Award Dashboard as shown below.*

Report	Reporting Period	Created By	Date Created	Current Status	Actions
Financial Report	03/25/2021 -- 04/07/2021	Rick Thompson	03/26/2021	Approved / Awaiting Payment	
Activity Report	03/28/2021 -- 04/07/2021	Rick Thompson	03/28/2021	Pending Approval	

## 6. GrAAM Procedure: Grant Amendments

### Purpose

The purpose of this procedure is to instruct DCA subrecipients how to amend their grant using the GrAAM Portal.

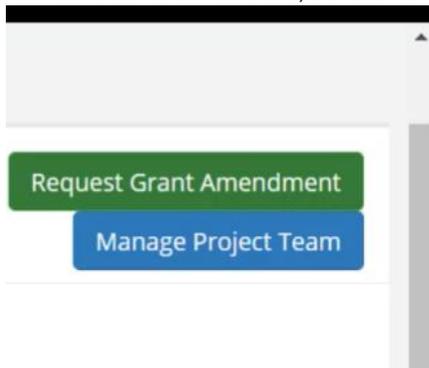
This procedure is used for amendments, budget revisions, de-obigation requests, extension requests, and change of scope requests.

### Key Instructions

1. Begin by logging into your [Portal](#) account. Using the Navigation panel on the left, select **My Awards**. After selecting the award you would like to amend, you will be navigated to the **Award Dashboard**.

The screenshot shows the 'Award Dashboard' interface. At the top, there is a navigation bar with buttons for 'View Budget', 'View Goals', 'View Files', 'Submit Financial Report', 'Submit Activity Report', 'Request Grant Amendment', and 'Manage Project Team'. Below this, the dashboard displays award details for a subrecipient named 'Atlanta Housing Organization'. The project is 'Atlanta Housing Project', approved on '12/22/2020', with an approved amount of '\$0.00'. It also shows 'Total Federal Award: \$55,000.00' and 'Total Non-Federal Award: \$0.00'. The program is 'Test CDBG DR HRRP', award ID is '98765', and EIN is '12-3456789'. The performance period is '01/01/2021 - 01/01/2022'. Below the details is a 'Pending Tasks' section with a search bar and a table header for 'Task Type', 'Due Date', and 'Actions'. The table currently shows 'No pending tasks to display.'

2. On the award dashboard, select **“Request Grant Amendment”**.



3. The following window will give you the opportunity to edit any award details such as project name or performance period. Once everything looks correct, select **“Save and Continue”**.

### Grant Amendment

AWARD DETAILS    FINANCIAL INFORMATION    FINALIZE GOALS    ATTACH FILES

Please edit the appropriate information below.

Organization Name:\* Atlanta Housing Organization

Project Name:\* Atlanta Housing Project

EIN:\* 12-3456789

Performance Period End:\* 01/01/2022

The performance Period End date must be changed for extension requests!

Save and Continue

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- Next if there are any financial changes, in the Financial Information section, select the checkbox that states "This amendment includes a financial change". This will display fields to input financial updates. Once all updates have been entered, select **Continue** at the bottom of the page.

AWARD DETAILS    FINANCIAL INFORMATION    FINALIZE GOALS

Amendment details saved successfully.

This amendment includes a financial change

Budget Settings

Indirect Costs: Not Applicable, 0.00 %

Match / Cost Share: Not Applicable, 0.00 % \$ 0.00

Budget Stage: Post-Award

Actions: [Save] [Cancel] [Export]

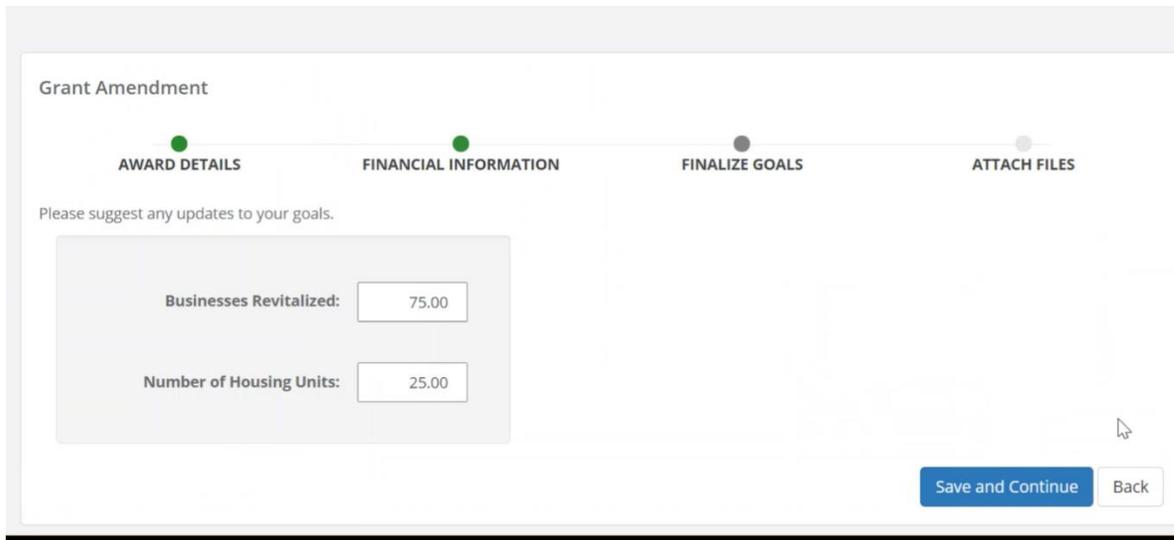
Budget Summary

\$46,000.00	Total Direct Costs
\$0.00	Total Indirect Costs
\$46,000.00	Total Amount (Direct + Indirect)
\$0.00	Match / Cost Share
\$0.00	Program Income

Budget Items

Back    Continue

5. The Finalize Goals section allows DCA subrecipients to change **Award Goals/Accomplishments**. For the example award below, the subrecipient will update the number for *Businesses Revitalized* and *Number of Housing Units*. When finished, press **“Save and Continue”**.



Grant Amendment

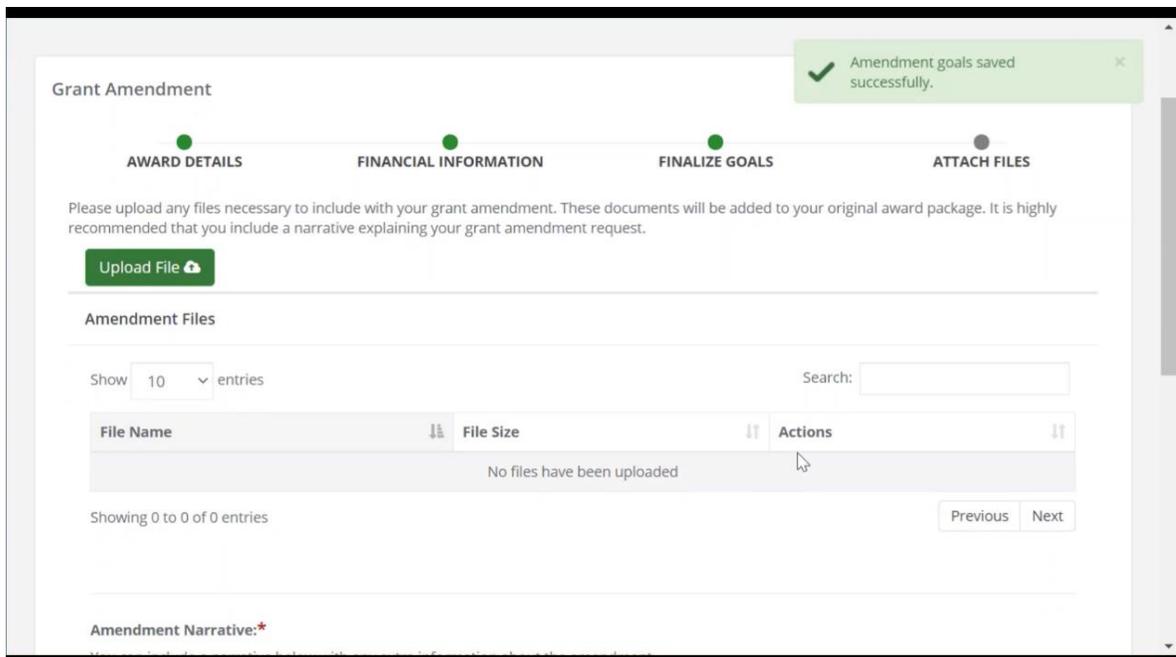
AWARD DETAILS
FINANCIAL INFORMATION
FINALIZE GOALS
ATTACH FILES

Please suggest any updates to your goals.

Businesses Revitalized:

Number of Housing Units:

6. Lastly, subrecipients can add any supporting files to help document the amendment request. Once the files have been added, select **“Submit Amendment”**. This will send your request to the appropriate DCA representative .



Grant Amendment

AWARD DETAILS
FINANCIAL INFORMATION
FINALIZE GOALS
ATTACH FILES

Amendment goals saved successfully.

Please upload any files necessary to include with your grant amendment. These documents will be added to your original award package. It is highly recommended that you include a narrative explaining your grant amendment request.

Amendment Files

Show  entries Search:

File Name	File Size	Actions
No files have been uploaded		

Showing 0 to 0 of 0 entries

Amendment Narrative:\*

1. Once the grant amendment has been reviewed and approved, the subrecipient will receive an email notification from eCivis Support. *Note: If your amendment is not approved, you will receive a task to edit or explanation as to why it was not approved either in the Pending Tasks section or Award Activities section respectively. Both sections can be found on the Award Dashboard screen (see Step 1).*



Your amendment for the following program has a response

Title: Test CDBG DR HRRP

Project: Atlanta Housing Project

Status: Approved

Full details are available in the [eCivis Portal](#).

Sincerely,

*eCivis Support Team*

[support@ecivis.com](mailto:support@ecivis.com)

(877) 232-4847, option 2, 8am-5pm PT

## 7. Procedure: Adding Project Team Members

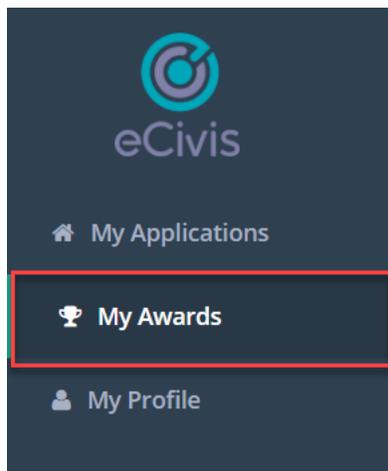
### Purpose

The purpose of this procedure is to inform DCA subrecipients of how to add “Project Team Members” to a Portal Workspace. Adding Project Team Members to your workspace gives additional people the authority to address pending tasks, update applications, submit grant amendments, and request reimbursements etc.

**Note:** Before adding additional Project Team Members to your workspace, **prospective members should first create a Portal account**. Please refer your prospective project team members to create an account using the link [here](#) and proceed to the “Create an Account” option.

### Key Instructions

- Once your prospective team member(s) have created a Portal Account, as the workspace owner, you will begin the process of Adding Project Team Members to your workspace by logging into your [Portal](#) account, using the **Navigation Panel** on the left and selecting “**My Awards**.”



- On the main page of the **My Awards** section, select the button with three lines in the “Actions” column. From the dropdown, select “**Manage Award**.”

My Awards ^

Show  entries Search:

Grant Title	Project Title	Award Status	Notification Date	Performance Period	Role	Actions
Test CDBG DR HRRP	Atlanta Housing Project	Awarded	12/22/2020	1/1/21 - 1/1/22	Owner	
Test CDBG DR HRRP	Test City of Macon	Pending Direct Award	N/A	Not specified		Manage Award

Showing 1 to 2 of 2 entries Previous 1 Next

- The following page will be the Award Dashboard. At the far right, you will notice a button that reads **“Manage Project Team.”** Select this option.

Award Dashboard

Award Detail

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

Subrecipient: Atlanta Housing Organization Program: Test CDBG DR HRRP  
Project: Atlanta Housing Project Award ID: 98765  
Approval Date: 12/22/2020 EIN: 12-3456789  
Approved amount: \$0.00 +  
Total Federal Award: \$55,000.00  
Total Non-Federal Award: \$0.00  
Total Match: \$0.00  
Performance period: 01/01/2021 - 01/01/2022

- The next screen you will be taken to will be the Project Team Management window. Select the green button that reads, **“Add Team Member.”**

Project Team

Award Detail

Back to Award Detail

Test CDBG DR HRRP **Awarded**  
Awarded by: GA DCA Demo  
Approved amount: \$0.00  
Match type:  
Performance period: 01/01/2021 - 01/01/2022

Project Team

**Add Team Member**

Show 10 entries Search:

Invitation Email	Accepted By	Status	Actions
No project team members to display.			

Showing 0 to 0 of 0 entries Previous Next

5. Enter in the email of the desired project team member in the “Add Project Team Member” pop-up window. Then select, “**Add Member.**”

**Note:** Be sure that the email address you enter here is the same email address that the prospective Project Team Member(s) used to set up a Portal account. If a project team member is added in this step before they have set up a Portal account, the system will require them to create a portal account before they can access the project workspace through the email invitation (See step 7 for information on the email invitation).

6. In the project team section, you’ll notice the status for your team member invitation will state “Pending”. At this time, the prospective team member can expect to have an invitation link to your project workspace in their email.

Invitation Email	Accepted By	Status	Actions
[Redacted]		Pending	[Menu Icon]

7. Next, the prospective Project Team Member should check their email inbox for an automated email from eCivis Portal Support containing the workspace invitation link. **If the link does not take the team member to the workspace, please advise the team member to log into their Portal account first and re-attempt accessing the link via the invitation email** once they are logged in.



[Redacted] has invited you to join their grant project team on the eCivis Portal

Project Name: Atlanta Housing Project

Please use the following link to respond. You may be required to create a free account if you do not already have an account on the eCivis Portal:

<https://portal.ecivis.com/#/loginTeam/A7C6BE2B-FA11-4157-883A-1C2FA443F1A4>

Sincerely,

*eCivis Support Team*

[support@ecivis.com](mailto:support@ecivis.com)

- On the Portal screen, the team member will select “**Accept Invitation,**” giving them access to the workspace.

## Project Team Invitation

### Invitation Detail

You have been invited to join the project team for **Atlanta Housing Project** by Alexis Gilmer

Accept Invitation

Reject Invitation

- To confirm if the person you added has successfully been added as a team member, navigate back to the Project Team member window (see Step 4), and verify that the status has changed to “**accepted**”. If so, you have successfully added a project team member to the workspace.

Project Team			
Add Team Member			
Invitation Email	Accepted By	Status	Actions
dcagrnttester@gmail.com	dcagrnttester@gmail.com(Jane Smith)	Accepted	

Showing 1 to 1 of 1 entries

Previous 1 Next