



Application Reviewer Guide

Competitive Award Management for Reviewers

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Application Reviewer Overview

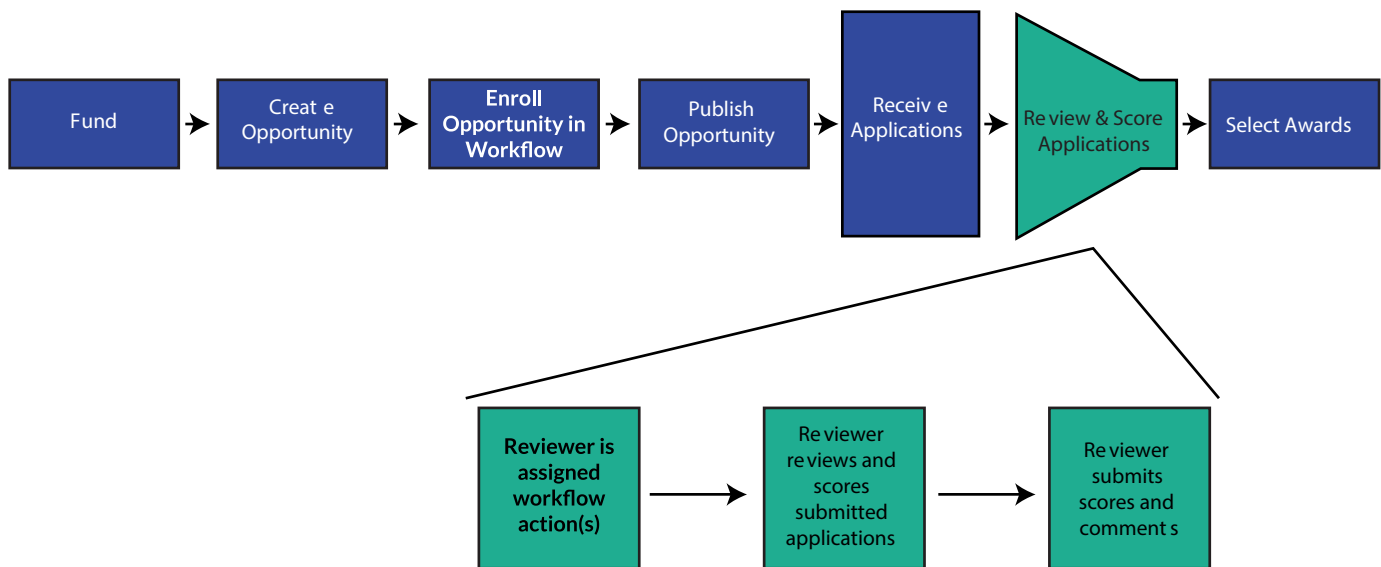
Note

This guide follows the Opportunity Application Review default workflow instance. Workflow actions may vary depending on your organization's settings.

The *Competitive Award Management* module allows funders to solicit and review applications submitted to a competitive opportunity. The module allows users to create competitive opportunities, publish to applicant-facing portal, and evaluate submitted applications.




This guide covers the application review portion of the competitive award management process. It is intended for users that have been assigned workflow actions to review and score applications. All actions will be documented in the Item History.

Competitive Award Management Process



Application Review Process

Icons


-  Print
-  Help
-  Download Application

Reviewing Applications

As applicants submit their applications, they will appear in the *Applications tab* in an opportunity. When a new application is received, the Opportunity Manager will receive an email notification from no-reply@gotomygrants.com. After an application has been submitted by an applicant, it may be enrolled in a workflow.

Users assigned the Review Application workflow action can review submitted applications enrolled in the Opportunity Application Review workflow instance.

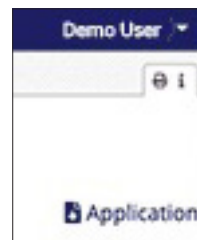
How To Download an Application

Users can download an application and its materials using the  **Application** link at any time. Application packets can also be accessed from the opportunity's *Tools tab>Documents*.

1. Open **Activity>Workflow Actions**.
2. Click on the **opportunity - application name**.


Name	Current Queue
FY 19 Ohio Community Grants - Applicant Organization E - FY 19 Ohio Community Grants	Application Scoring

3. Click the  **Application** link below the *Icon Bar*.



How To Download Multiple Applications

Multiple applications will be downloaded in a single .zip file. Each application and its materials will be in a separate folder.

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Applications tab**.
4. Check the **checkbox** next to organization names.
5. Click the  (**Download icon**) below *Actions*.



How To View an Application

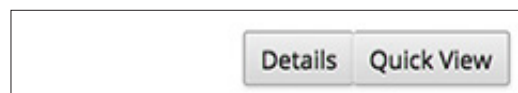
1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Applications tab**.
4. Click an **application name**.

How To View Application Materials

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Applications tab**.
4. Click an **application name**.
5. Open the **Application Materials tab>Project Information** to view basic information such as application name and total amount of award requested.
6. Open the **Application Materials tab>Application Forms** and click a **form name** to view applicant responses.

Name	Status
Project Description	Complete

7. Open the **Application Materials tab>Budget** to view applicant proposed budget. You can toggle between a detailed and quick view.



8. Open the **Application Materials tab>Performance Plan** to view applicant proposed performance plan.

How To Enroll Applications Into Review Workflows

Workflows can help facilitate the application evaluation, scoring, and awarding process in Euna Grants. To learn more about workflow, see the [Euna Grants Workflow Guide](#).

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Applications tab**.

4. Click an **application name**.
5. Open **Workflow tab>Add to Workflow>workflow instance**.
6. In the confirmation pop-up window, click **Confirm**.

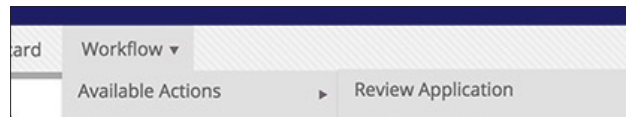
How To Review an Application

Prerequisite: Application must be enrolled in the Opportunity Application Review workflow instance.

1. Open **Activity>Workflow Actions**.
2. Click on the **opportunity - application name**.

Name	Current Queue
FY 19 Ohio Community Grants - Applicant Organization E - FY 19 Ohio Community Grants	Application Scoring

3. Open the **Workflow tab>Available Actions>Review Application**.






4. In the pop-up window, select if the applications passes your review in the *Pass Review* dropdown.



5. Add **Comments** (optional). These comments will be visible to users in your organization.
6. Add **Internal Comments** (optional). These comments will only be visible to you.
7. Click **Create**.

Icons

-  Print
-  Help
-  Download Application

Scoring Applications

Users assigned the Score Application workflow action can review submitted applications enrolled in the Opportunity Application Review workflow. Users can submit their scores and comments for each section of the application.

How To Score an Application

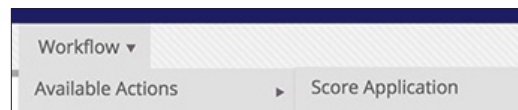
Prerequisite: Application must be enrolled in the Opportunity Application Review workflow instance and the Scoring workflow queue.

The Score Application workflow action allows users to score and comment on application materials.

1. Open **Activity>Workflow Actions**.
2. Click on the **opportunity - application name**.

Name	Current Queue
FY 19 Ohio Community Grants - Applicant Organization E - FY 19 Ohio Community Grants	Application Scoring

3. Open the **Workflow tab>Available Actions>Score Application**.



Application Forms

4. In the *Application Forms* section, click a **form name**.

Application Forms	
Drag a column header and drop it here to group by that column	
Name	Scored By You
Project Description	No

5. In the *Score* dropdown next to each field, select your **score**.



6. Add information in reviewer fields and upload reviewer files as necessary.
7. In the *Final Comments* section, add **Final Comments** (optional).
8. Click **Save** to save your progress or **Submit** to submit your score.
9. In the confirmation pop-up window, click **Yes**.

Budget

10. In the *Total Proposed Budget by Category* section, click **Comment** to add comments.
11. In the *Final Comments* section, add **Final Comments**.

12. Click **Submit Comments**.

Performance Plan

13. In the *Proposed Performance Plan* section, click **Comment** to add comments.
14. In the *Final Comments* section, add **Final Comments**.
15. Click **Submit Comments**.

Note

Once you submit your scores and comments for each section of an application, your review is complete.


How To View Your Scores

Your submitted scores and comments can be viewed on the application's Scorecard page. Depending on the application's settings, you may have the option to view scores and comments from previous scoring rounds and/or other reviewers. You may also have the option to edit your submitted scores for that round.




1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Applications tab**.
4. Click an **application name**.
5. Open the **Scorecard tab**.

How to Edit Your Submitted Scores

Prerequisite: Application Settings must allow *Edits After Submission*. This setting cannot be updated once applications have been received.

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Applications tab**.
4. Click an **application name**.
5. Open the **Scorecard tab**.
6. Click the  (**Edit icon**) next to your comments.

Icons

-  Print
-  Help
-  Delete

Reopening Applications

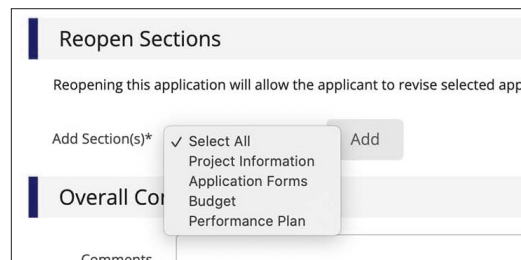
At any point in the review process, an application can be reopened to the applicant organization for editing and resubmission. Funders can specify which sections should be edited and provide instructions and comments to the applicant for each section. Applicants can resubmit applications after the opportunity window has closed. Each version of the application is available in the *Tools tab > Documents*.


How To Reopen an Application

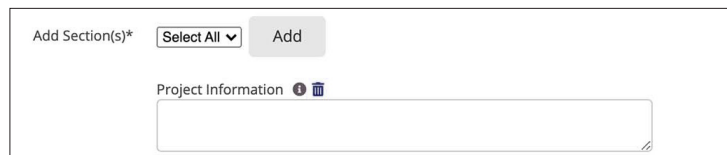
Applications can be reopened by sending the application to a workflow queue that has the workflow action to Change Submission Status to Reopened.

Prerequisite: Must have a workflow action with Send To Queue action type that sends object to queue with Change Submission Status to Reopened.

1. Send application to a workflow queue with *Change Submission Status* is **Reopened**.
2. In the pop-up window, select which **section(s)** to reopen in the *Reopen Sections* section, and click **Add**.



3. In the multi-line text box for each section, add **comments or instructions** to the applicant (optional). These will be sent to the applicant when the application is reopened. To restrict a section from being reopened, click the  (**Delete icon**) next to a section name.



4. In the *Overall Comments* section, add **Comments** (optional). These will also be provided to the applicant.
5. Click **Confirm** to reopen the application.

Note

If **Application Forms** is selected, all application forms will be reopened.

Note

If the awarded amount is to be updated, the Budget must also be reopened for editing. Likewise, if the overall budget is to be updated, Project Information must also be reopened for editing.