EUNA Grants

Powered by AmpliFund

Competitive Award Management User Guide

Contents

Competitive Award Management Overview

The *Competitive Award Management* upgrade module allows funders to solicit and review applications submitted to a competitive opportunity. The module allows users to create competitive opportunities, build forms, create budget and performance plan templates, access an applicant-facing portal, and access and evaluate submitted applications.

Euna Grants allows users to manage opportunities created from funds or grants.

Creating Opportunities

Competitive award opportunities can be created from a fund or a grant. These opportunities will be available for organizations to access, review, and submit applications for award consideration.

Icons

- Print
- Help
- Save View
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- Edit
- Copy
- Delete

Creating Opportunities

Opportunity records include details about the application, customizable forms, and templates for applicants to submit proposed budgets and performance plans.

The Fund Opportunities and Grant Opportunity lists shows the *Title, Opportunity Manager, Is Published, Submission Open Date, Submission Close Date, Fund Activity Category, Funding Sources,* and *Total Program Funding* columns by default. In addition, these columns are also available: *Allow Multiple Applications, Award Floor,* and *Award Ceiling*. Each of these columns may be shown or hidden, sorted, or filtered.

See the **Euna Grants User Interface Navigation Guide** to learn more about sorting and filtering list views.

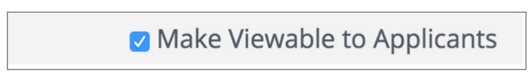
How To Create a Fund Opportunity

A fund opportunity is a competitive award opportunity with program funding from organizations, individuals, grants, and/or funds. Many of the fields are optional on the Opportunity form so that information can be added at a later time. However, publishing and posting an opportunity without the necessary information is not recommended.

1. Open **Award Management>Fund Opportunities**.
2. Click the **+ (Create icon)** in the *Icon Bar*.

Opportunity Information

3. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.



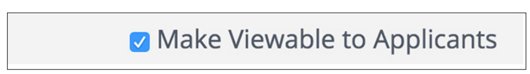
4. Add **Title**.
5. Add **Description** (optional).
6. Add **Awarding Agency Name** (optional).
7. Add **Agency Contact Name** (optional).
8. Add **Agency Contact Phone** (optional).
9. Add **Agency Contact Email** (optional).
10. Select **Fund Activity Categories**. This list pulls from *Administration>Lists>Fund Activity Categories*.
11. Add **Category Explanation** or description (optional).
12. Select **Department(s)** who can view and manage the opportunity. This list pulls from *Administration>System Security>Departments* (optional).
13. Select **Subject(s)**. This list pulls from *Administration>Lists>Subjects* (optional).

14. Select an **Opportunity Manager**. This list pulls from *Contacts>Staff*. Opportunity Managers can edit Opportunity Details and create, edit, and delete all items related to their opportunity, including application forms, and budget and performance plan templates. Additionally, Opportunity Managers can enroll opportunities and applications in workflows and will receive automated emails when applications have been submitted to their opportunity.
15. Select a **Posted Date**. This is the date a published fund opportunity will be available to applicants.
16. Select an **Archive Date**. This is the date a published fund opportunity will no longer be available to applicants.
17. Select **Announcement Type**.
18. Add a **Funding Opportunity Number** (optional). This is a reference number for the opportunity assigned by your organization.
19. Add an **Agency Opportunity Number** (optional). This is a reference number for the awarding agency assigned by your organization.
20. Add an **Assistance Listings Number** (formerly CFDA Number) (optional).
21. Check the **Is Published checkbox** to publish the opportunity. A published opportunity will be available to applicants between the Posted and Archive Dates. We recommend that you only publish the opportunity after all changes to the opportunity have been made.

Note
Once the opportunity has been created, you will be able to add funding sources to the *Total Program Funding.*

Funding Information

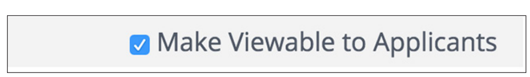
22. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.



23. Select **Funding Sources** (optional).
24. Add **Funding Source Description** (optional).
25. Add **Funding Restrictions** (optional).

Award Information

26. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.



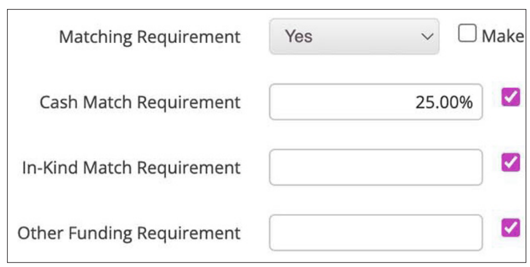
27. Add **Award Ceiling** (optional). This is the maximum amount a single award recipient may receive.
28. Add **Award Floor** (optional). This is the minimum amount a single award

recipient may receive.

29. Select the expected **Award Start Date** (optional).
30. Select the expected **Award End Date** (optional).
31. Select the **Award Announcement Date** (optional).
32. Select the **Award Type**.
    - **Competitive:** Applications will be scored in a merit-based review.
    - **Non-competitive:** Applications will not be scored.

Note
This field is informative only; it will not determine your ability to add scores to your opportunity.

33. Select if the award is a **Capital Grant.**
34. Add the **Expected Number of Awards** (optional).
35. Select if **Indirect Costs Allowed**.
    a. If *Yes*, add **Indirect Cost Description** (optional) and **Indirect Cost Rate** (optional).
    b. Select if there are **Restrictions on Indirect Costs**. If *Yes*, add **Citation Governing Indirect Cost Restriction** (optional).
36. Select **Matching Requirement**.
    a. If *Yes*, add **Cash Match Requirement**, **In-Kind Match Requirement,** and **Other Funding** percentages (in decimal format).



Reconciliation Methods

Note
This section is only available if the **Allow Advance Payments checkbox** is checked in *Administration>License Information>Settings*.

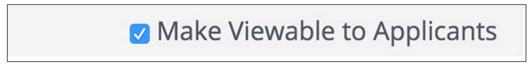
37. Select Allowable Reconciliation Methods.
    - **Advance Payment:** Grant funds are given to recipient a defined payment schedule which includes an initial advance
    - **Working Capital:** Grant funds are given to recipient based on maintaining the working capital rate over the life of the grant. Includes an initial advance.
    - **Reimbursement:** Recipient spends own money and then requests grant funds as reimbursement

    a. If *Advance Payment*, add **Suggested Initial Advance** and **Payment Schedule Instructions**.
    b. If *Working Capital*, add **Suggested Initial Advance** and **Suggested Working Capital Rate**.
38. Add **Attachments** as desired. This field can be used for providing the

applicant a template to fill out and upload with their application.

Submission Information

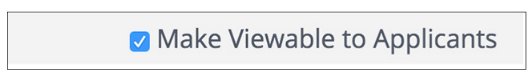
39. Uncheck the **Make Viewable to Applicants checkbox** to hide all information in the section to applicants.



40. Select **Submission Timeline Type**.
    - **One-Time:** Applications will only be accepted for a specified timeframe
    - **Rolling:** Applications will continuously be accepted after specified date
41. Select **Submission Open Date**. This is the date and time that applications will be accepted.
42. Add **Submission Close Date** (for one-time submissions). This is the date and time that applications will no longer be accepted.
43. Select **Time Zone** for all opportunity dates and times.
44. Add **Submission Timeline Additional Information** (optional).
45. Check the **Allow Multiple Applications checkbox** to allow an organization to submit multiple applications.
46. Add the **Application Review Start Date / Pre-Qualification Deadline** (optional). This is the date applications will start being reviewed.
47. Add **Other Submission Requirements** (optional).

Question Submission Information

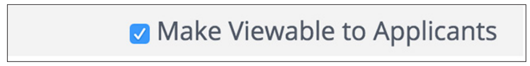
48. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.



49. Add a **Question Submission Open Date** (optional). This is the date that applicants may start submitting questions about the opportunity.
50. Add a **Question Submission Close Date** (optional). This is the date that applicants can no longer submit questions about the opportunity.
51. Add a **Question Submission Email Address** (optional). This is the email address where applicants should submit their questions. It will appear as a link on the opportunity. The email subject will default to the opportunity's name.
52. Add **Question Submission Additional Information** (optional).
53. Add **Attachments**. This can include a summary of questions and answers for applicants to view.

Technical Assistance Session

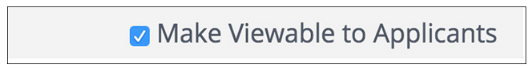
54. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.



55. Select if there will be a **Technical Assistance Session** for applicants.
    a. If *Yes*, add **Session Date and Time** (optional).
    b. Add **Conference Info / Registration Link** (optional). This will appear as a link on the opportunity.

Eligibility Information

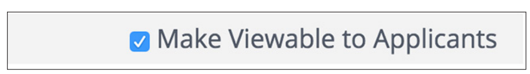
56. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.



57. Select **Eligibility Type**.
    - **Public:** Opportunity appears on funder's opportunity list in the Applicant Portal
    - **Private:** Opportunity does not appear on funder's opportunity list in the applicant portal and can only be accessed by URL link
58. Select **Eligible Applicants**. These are organization types that can apply to the opportunity.
59. Add **Additional Eligibility Information** (optional).

Additional Information

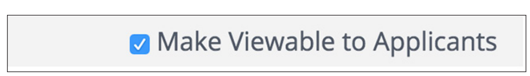
60. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.



61. Add **Additional Information URL** (optional). This is a website link that may provide more information for applicants.
62. Add **Additional Information URL Description** (optional).

Award Administration Information

63. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.



64. Add **State Award Notices, Administrative and National Policy Requirements, Reporting, State Awarding Agency Contacts,** and **Other Information** (optional).
65. Click **Create**. This will also create a Public Link that can be used to access

the opportunity on the Applicant Portal. The link will only be active for applicants when the opportunity has been published.

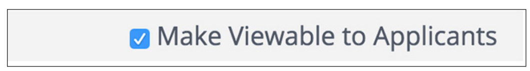
How To Create a Grant Opportunity

A grant opportunity is a competitive sub-award opportunity with program funding from exclusively the parent grant. Many of the fields are optional on the Opportunity form so that information can be added at a later time. However, publishing and posting an opportunity without the necessary information is not recommended.

1. Open **Grant Management>Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Grant Opportunities**.
4. Click the **+ (Create icon)** in the *Icon Bar*.

Opportunity Information

5. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.



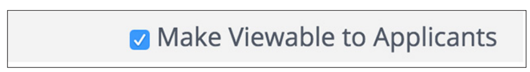
6. Add **Title**.
7. Add **Description** (optional).
8. Add **Awarding Agency Name** (optional).
9. Add **Agency Contact Name** (optional).
10. Add **Agency Contact Phone** (optional).
11. Add **Agency Contact Email** (optional).
12. Select **Fund Activity Categories**. This list pulls from *Administration>Lists>Fund Activity Categories*.
13. Add **Category Explanation** or description (optional).
14. View **Department(s)** who can view and manage the opportunity. This list pulls from *Administration>System Security>Departments*. To change the Grant Opportunity departments, update the departments on the parent grant.
15. Select **Subject(s)**. This list pulls from *Administration>Lists>Subjects* (optional).
16. Select an **Opportunity Manager**. This list pulls from *Contacts>Staff*. Opportunity Managers can edit Opportunity Details and create, edit, and delete all items related to their opportunity, including application forms, and budget and performance plan templates. Additionally, Opportunity Managers can enroll opportunities and applications in workflows and will receive automated emails when applications have been submitted to their

opportunity.

17. Select a **Posted Date**. This is the date a published fund opportunity will be available to applicants.
18. Select an **Archive Date**. This is the date a published fund opportunity will no longer be available to applicants.
19. Select **Announcement Type**.
20. Add a **Funding Opportunity Number** (optional). This is a reference number for the opportunity assigned by your organization.
21. Add an **Agency Opportunity Number** (optional). This is a reference number for the awarding agency assigned by your organization.
22. Add an **Assistance Listings Number** (formerly CFDA Number) (optional).
23. Check the **Is Published checkbox** to publish the opportunity. A published opportunity will be available to applicants between the Posted and Archive Dates. We recommend that you only publish the opportunity after all changes to the opportunity have been made.

Funding Information

24. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.

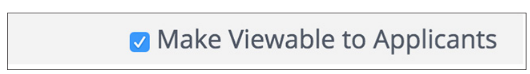


Note
The *Total Program Funding* amount is the grant's *Total Awarded Amount.*

25. Select **Funding Sources** (optional).
26. Add **Funding Source Description** (optional).
27. Add **Funding Restrictions** (optional).

Award Information

28. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.



29. Add **Award Ceiling** (optional). This is the maximum amount a single award recipient may receive.
30. Add **Award Floor** (optional). This is the minimum amount a single award recipient may receive.
31. Select the expected **Award Start Date** (optional).
32. Select the expected **Award End Date** (optional).
33. Select the **Award Announcement Date** (optional).
34. Select the **Award Type**.

- **Competitive:** Applications will be scored in a merit-based review.
- **Non-competitive:** Applications will not be scored.

35. Select if the award is a **Capital Grant.**
36. Add the **Expected Number of Awards** (optional).
37. Select if **Indirect Costs Allowed**.
    a. If *Yes*, add **Indirect Cost Description** (optional) and **Indirect Cost Rate** (optional).
    b. Select if there are **Restrictions on Indirect Costs**. If *Yes*, add **Citation Governing Indirect Cost Restriction** (optional).

Note

This field is informative only; it will not determine your ability to add scores to your opportunity.

38. Select **Matching Requirement**.
    a. If *Yes*, add **Cash Match Requirement** and **In-Kind Match Requirement** percentages (in decimal format).

Reconciliation Methods

39. Select Allowable Reconciliation Methods.
    - **Advance Payment:** Grant funds are given to recipient a defined payment schedule which includes an initial advance
    - **Working Capital:** Grant funds are given to recipient based on maintaining the working capital rate over the life of the grant. Includes an initial advance.
    - **Reimbursement:** Recipient spends own money and then requests grant funds as reimbursement

    a. If *Advance Payment*, add **Suggested Initial Advance** and **Payment Schedule Instructions**.
    b. If *Working Capital*, add **Suggested Initial Advance** and **Suggested Working Capital Rate**.

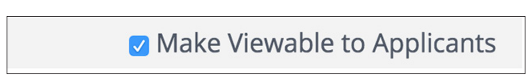
Note

This section is only available if the **Allow Advance Payments checkbox** is checked in *Administration>License Information>Settings*.

40. Add **Attachments** as desired. This field can be used for providing the applicant a template to fill out and upload with their application.

Submission Information

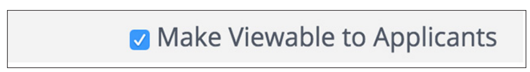
41. Uncheck the **Make Viewable to Applicants checkbox** to hide all information in the section to applicants.



42. Select **Submission Timeline Type**.
    - **One-Time:** Applications will only be accepted for a specified timeframe
    - **Rolling:** Applications will continuously be accepted after specified date
43. Select **Submission Open Date**. This is the date and time that applications will be accepted.
44. Add **Submission Close Date** (for one-time submissions). This is the date and time that applications will no longer be accepted.
45. Select **Time Zone** for all opportunity dates and times.
46. Add **Submission Timeline Additional Information** (optional).
47. Check the **Allow Multiple Applications checkbox** to allow an organization to submit multiple applications.
48. Add the **Application Review Start Date / Pre-Qualification Deadline** (optional). This is the date applications will start being reviewed.
49. Add **Other Submission Requirements** (optional).

Question Submission Information

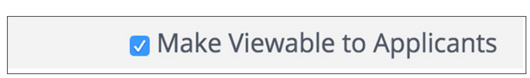
50. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.



51. Add a **Question Submission Open Date** (optional). This is the date that applicants may start submitting questions about the opportunity.
52. Add a **Question Submission Close Date** (optional). This is the date that applicants can no longer submit questions about the opportunity.
53. Add a **Question Submission Email Address** (optional). This is the email address where applicants should submit their questions. It will appear as a link on the opportunity. The email subject will default to the opportunity's name.
54. Add **Question Submission Additional Information** (optional).
55. Add **Attachments**. This can include a summary of questions and answers for applicants to view.

Technical Assistance Session

56. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.

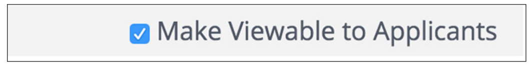


57. Select if there will be a **Technical Assistance Session** for applicants.
    a. If *Yes*, add **Session Date and Time** (optional).
    b. Add **Conference Info / Registration Link** (optional). This will appear as

a link on the opportunity.

Eligibility Information

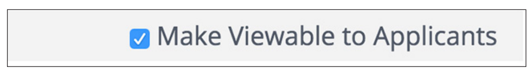
58. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.



59. Select **Eligibility Type**.
    - **Public:** Opportunity appears on funder's opportunity list in the Applicant Portal
    - **Private:** Opportunity does not appear on funder's opportunity list in the applicant portal and can only be accessed by URL link
60. Select **Eligible Applicants**. These are organization types that can apply to the opportunity.
61. Add **Additional Eligibility Information** (optional).

Additional Information

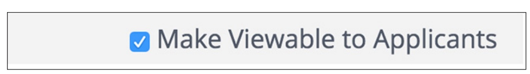
62. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.



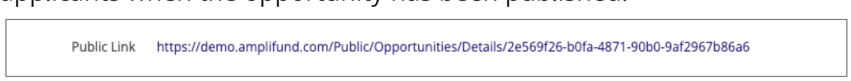
63. Add **Additional Information URL** (optional). This is a website link that may provide more information for applicants.
64. Add **Additional Information URL Description** (optional).

Award Administration Information

65. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.



66. Add **State Award Notices, Administrative and National Policy Requirements, Reporting, State Awarding Agency Contacts,** and **Other Information** (optional).
67. Click **Create**. This will also create a Public Link that can be used to access the opportunity on the Applicant Portal. The link will only be active for applicants when the opportunity has been published.



How To Edit an Opportunity

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.

2. Click the ✎ **(Edit icon)** next to an opportunity name.

3. Update the information as necessary.
4. Click **Save**.

How To Delete an Opportunity

Prerequisite: No applications can be started or submitted

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click the 🗑 **(Delete icon)** next to an opportunity name.

3. In the confirmation pop-up window, click **Delete**.

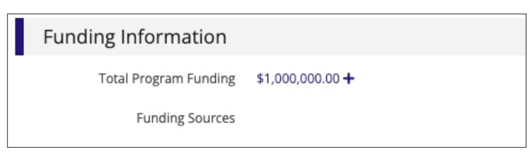
How To Add Opportunity Funding to a Fund Opportunity

Opportunity funding can be added after a fund opportunity has been created. Opportunity funding for grant opportunities cannot be edited.

1. Open **Award Management>Fund Opportunities**.
2. Click a **fund opportunity**.

Funding Information

3. Click the + **(Add icon)** next to *Opportunity Funding*.

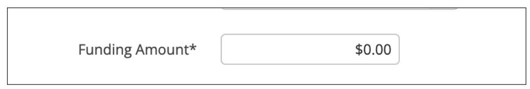


4. In the pop-up window, select **Funding Type**.
5. Select the **Funding Source**.
6. Add the **Funding Amount.** This will update the *Opportunity Funding* amount displayed.

7. Click **Add**.

--OR--

1. Open **Award Management>Fund Opportunities**.
2. Click a **fund opportunity**.
3. Open the **Configuration tab>Opportunity Funding**.
4. Click the **+ (Add icon)** in the *Icon Bar*.
5. In the pop-up window, select **Funding Type**.
6. Select the **Funding Source**.
7. Add the **Funding Amount.** This will update the *Opportunity Funding* amount displayed.



8. Click **Add**.

Applicant Portal

As a funder, you can configure many aspects of how your opportunity appears on the Applicant Portal for applicant organizations, including opportunity information, custom application forms, budget and performance plan templates, and required sections. Funders can also add their logo to the Applicant Portal and additional help information and links.

Icons

Print

Help

Edit

Setting Up the Applicant Portal

Opportunities will be available for applicants on the Applicant Portal.

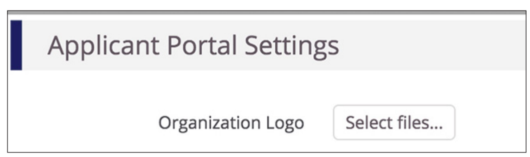
How To Add Your Organization's Logo to the Applicant Portal

Your organization's logo will appear on every page of your Applicant Portal, except for the general Applications Listing page which includes all available opportunities from all funding organizations. If no logo is provided, the Euna Grants logo will appear by default.

1. Open **Administration>License Information.**
2. Open the **Settings tab**.
3. Click the **(Edit icon)** in the *Icon Bar*.

Applicant Portal Settings

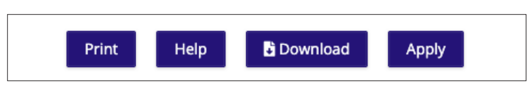
4. Click **Select Files...** to select a file from your computer. Euna Grants supports JPG and PNG image files.



5. Click **Update**.

How To Add Help Information to the Applicant Portal

You can optionally add help and technical help information for your applicants on each opportunity. This information will appear when applicants click *Help* within an opportunity.



1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click a **fund opportunity**.
3. Open the **Configuration tab>Application Settings.**

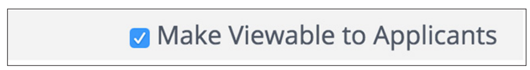
Applicant Portal Settings

4. Add general **Help Description** or information.
5. Add **Help Email, Name**, and **Phone Number**.
6. Add **Technical Help Description** or information.
7. Add **Technical Help Email, Name**, and **Phone Number**.
8. Click **Update**.

How To Hide Opportunity Information from Applicants

Opportunity information can be shown or hidden from applicants. Section information is shown to applicants by default.

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click the **(Edit icon)** next to an opportunity name.
3. Uncheck the **Make Viewable to Applicants checkbox** in a section.



4. Uncheck the **Make Viewable to Applicants checkbox** next to a field.

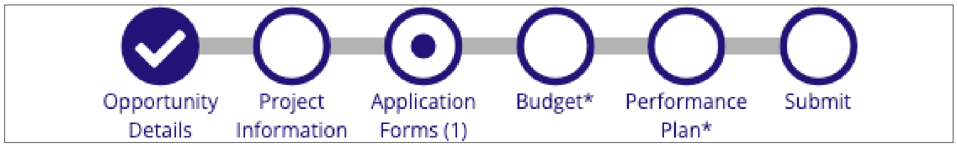
5. Click **Save**.

Icons

- Print
- Help
- Create
- Copy
- Edit
- Delete
- Move Up
- Move Down

Application Forms

Application forms are customized forms that capture applicant information and responses. Once applicants submit applications, reviewers may score applications based on form responses.



How To Add an Application Form

One or more application forms may be created for each funding opportunity. Forms may also be copied from pre-existing funding opportunities.

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Forms tab**.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. Add a **Form Name**.
6. Add sections and fields to the form. For more information, see **Form Builder Features**.
7. Click **Save**.

Form Builder Features

Form Builder Icons

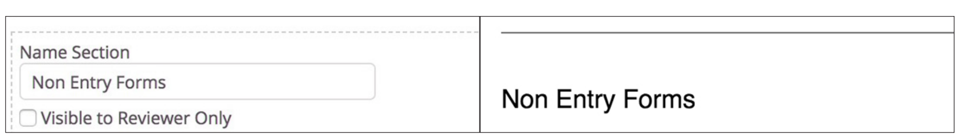
All sections and fields can be edited, deleted, or moved up or down using the icons.

Template Section

The Template Section includes commonly used form sections that can be quickly added to any application form for your convenience. This templates are provided by default and cannot be added to or edited.

Section

Sections group fields together (although not fields are not required to be within a section). Entire sections can be hidden from the applicant and only made visible to the reviewer.

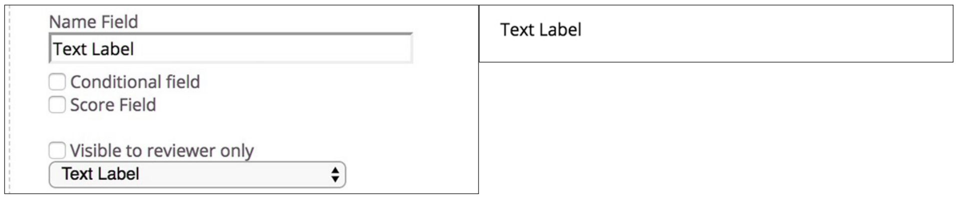


Field

Fields can be content or entry types. Content fields provide content only and do not request a response. Entry fields request or require a response. Additionally, fields be marked for reviewer scoring, be made conditional (only appearing for specific responses), or can be hidden from the applicant and only made visible to the reviewer.

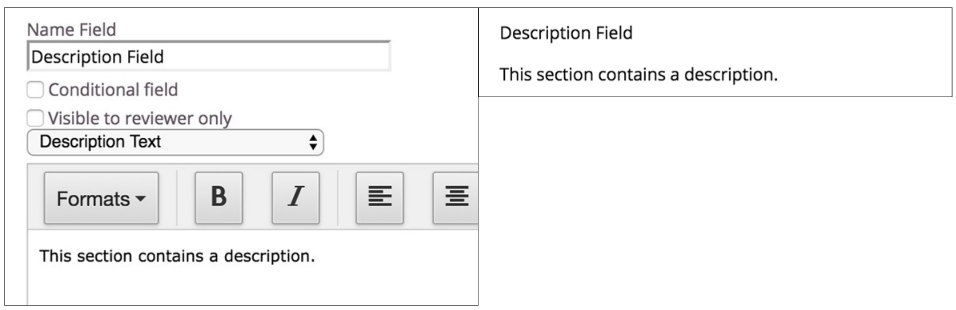
Text Label

Text Label fields are short texts that appear as the *Name Field* content. They do not request a response.



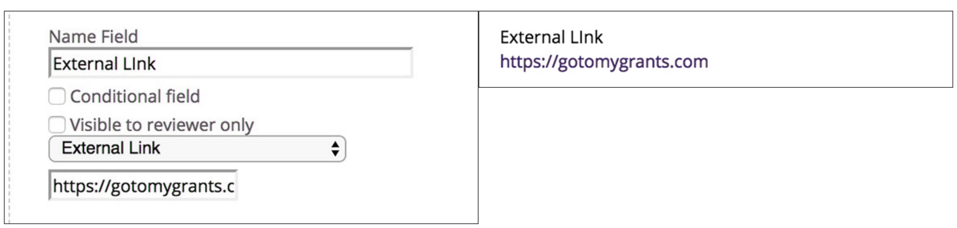
Description Text

Description Text fields are long texts that appear as a field name and paragraph(s). They do not request a response and cannot be scored.



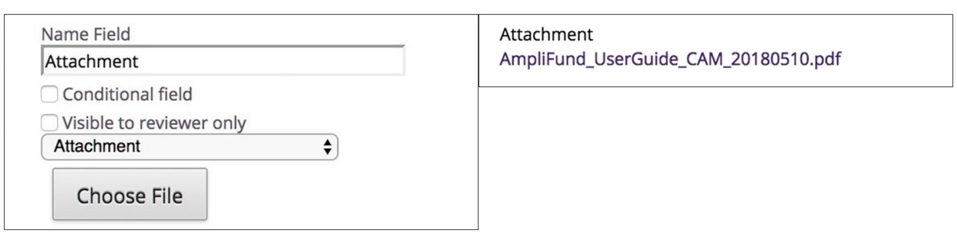
External Link

External Link fields appear as URL links. They do not request a response and cannot be scored.



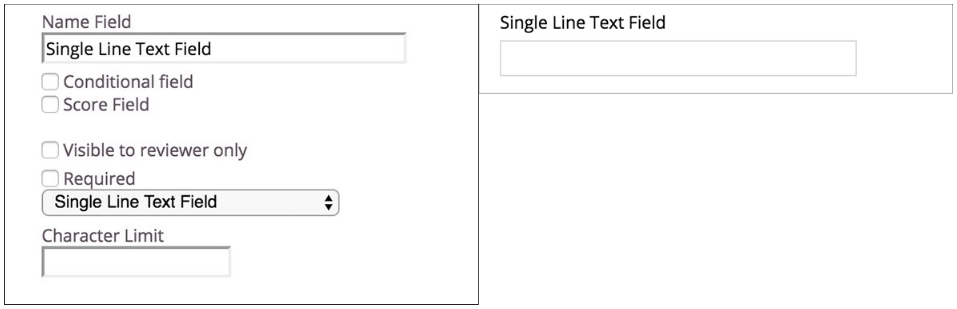
Attachment

Attachment fields appear as links to downloadable files. They do not request a response and cannot be scored.



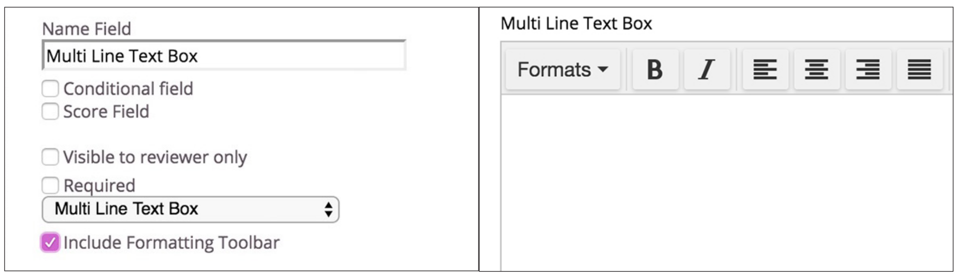
Single Line Text Field

Single Line Text fields request or require short answer responses.



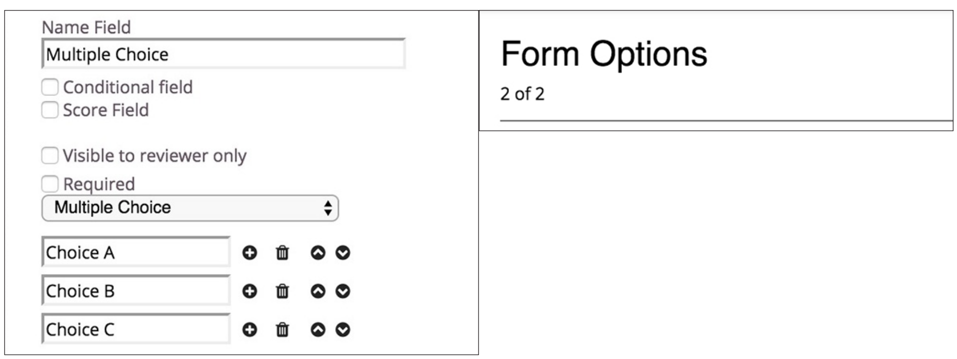
Multi Line Text Box

Multi Line Text Box fields request or require long answer responses. A formatting toolbar can be added to the field and a character limit for responses can be enforced.



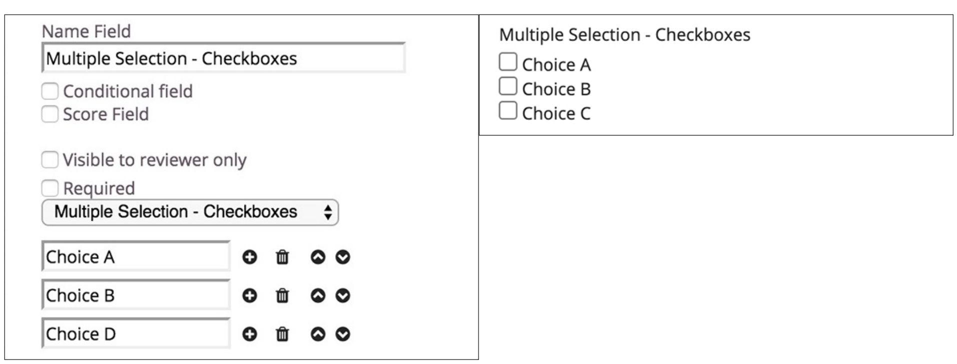
Multiple Choice

Multiple Choice fields request or require a single selection from multiple options.



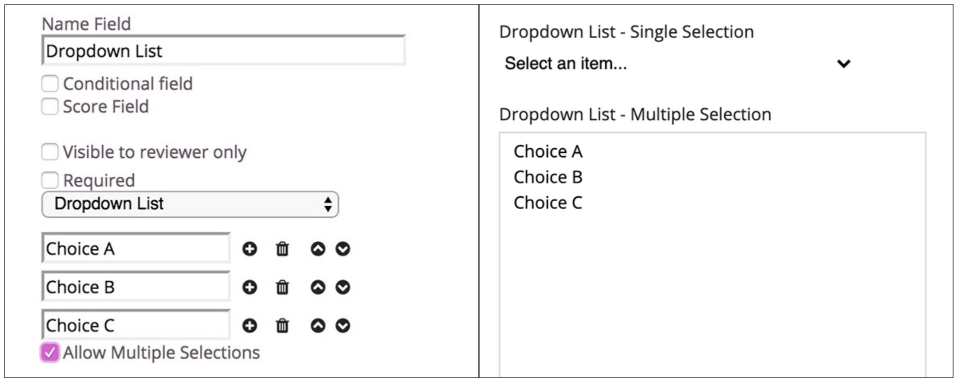
Multiple Selection - Checkboxes

Multiple Selection - Checkboxes fields request or require selection(s) from multiple options.



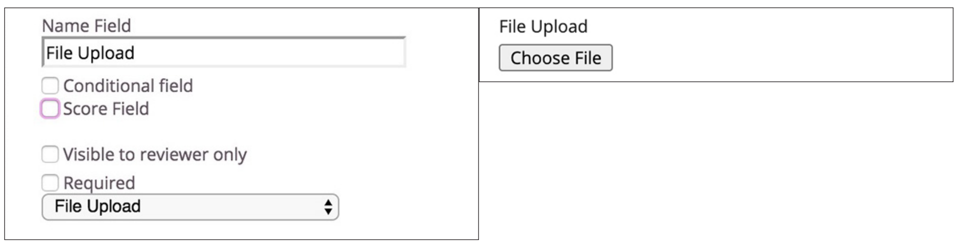
Dropdown List

Dropdown List fields request or require a single selection from multiple options by default, but multiple selections can be allowed.



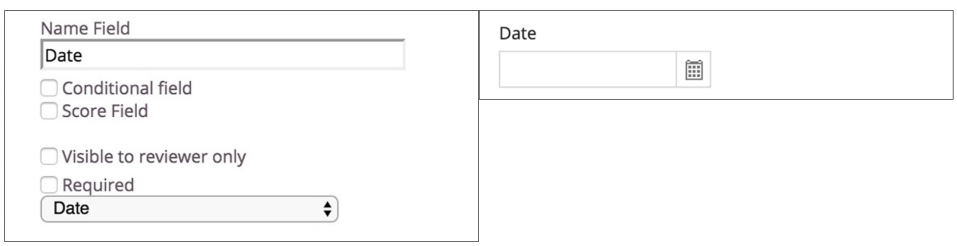
File Upload

File Upload fields request or require a file to be uploaded.



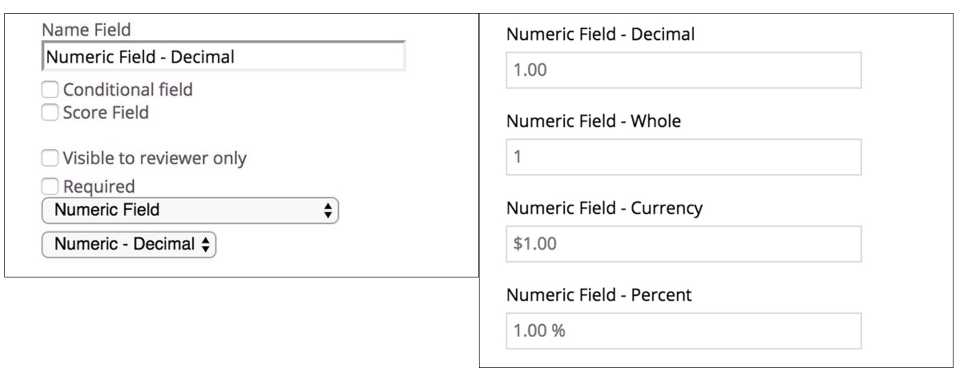
Date

Date fields request or require a date to be selected.



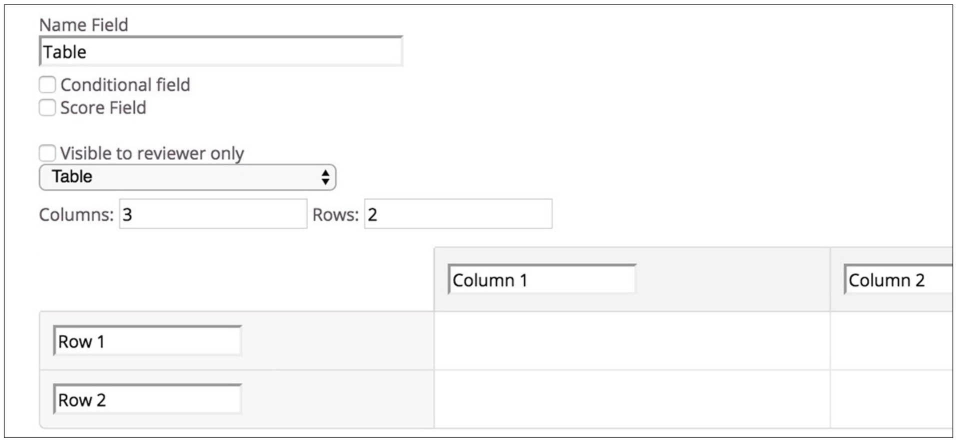
Numeric Field

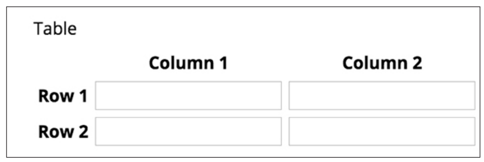
Numeric Fields request or require a numeric entry. These can be decimal, whole numbers, currency, or percent entires.



Table

Table fields request data entered in a table. The number of rows and columns for the table can be configured, and column and row labels can be added.





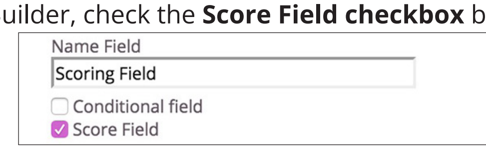
How To Add Scoring Parameters to a Field

Note

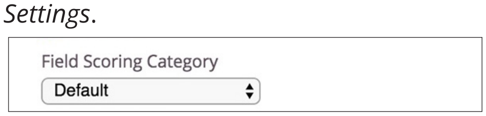
If you wish to report on reviewers' scores along with comments, then you must score the **reviewer entry field** instead of the applicant field.

Scoring categories and scale (i.e., a scale of 0-10) can be set on each field. Default score scale can be set for the opportunity from *Configuration tab>Application Settings*, but can be overridden on each field. For more information, see **Scoring and Review Settings**.

1. On the Form Builder, check the **Score Field checkbox** below the *Name Field*.



2. Select **Field Scoring Category**. This list pulls from the *Configuration tab>Application Settings*.



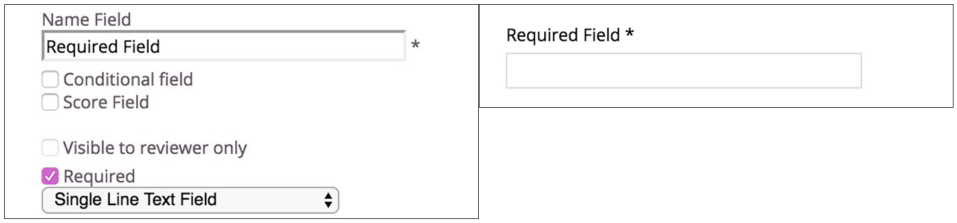
3. Set **Field Score Scale**. This defaults to scale set in *Configuration tab>Application Settings*.

How To Make a Field Required

Prerequisite: Must be an entry field type.

The field will be required for applicants only.

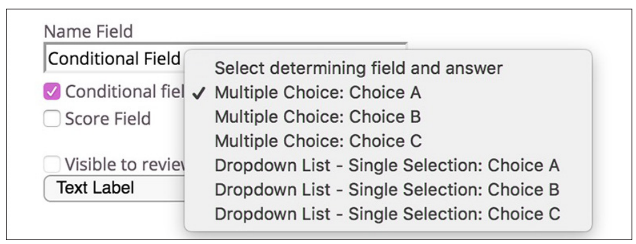
1. On the Form Builder, select an **entry field type.**
2. Check the **Required checkbox**.



How To Add a Conditional Field

Prerequisite: A parent or determining field must be created. The parent field must have a single selection for response: Multiple Choice or Dropdown List (without allowing multiple selections).

1. On the Form Builder, check the **Conditional Field checkbox** below *Name Field*.
2. Select **Determining Field and Answer**. When this answer is selected, the conditional field will be visible to the applicant.



How To Hide a Field or Section from Applicants

Note

If you wish to report on reviewers' scores along with comments, then you must score the **reviewer entry field** instead of the applicant field.

Any field or section can be hidden from applicants and be shown to reviewer users only. If a section is hidden, all fields within the section will also be hidden.

1. On the Form Builder, check the **Visible to reviewer only checkbox** below *Name Section* or *Name Field*. The reviewer-only fields and sections will have a gray background when previewing the form application. You can also preview the applicant and reviewer views using the buttons below the *Icon Bar.*

How To Reorder Application Forms

Application forms will appear on the Applicant Portal in the same order as listed on the *Forms tab.*

1. Open **Award Management>Fund Opportunities** or **>Grant**

Opportunities.

2. Click an **opportunity name**.
3. Open the **Forms tab**.
4. Use the **(Move Up)** or **(Move Down)** icons next to a form name to change the form order.

Note
Forms can also be reordered by drag and drop.

How To Save an Application Form as a Template

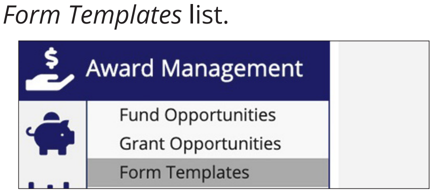
Prerequisite: Must be an Organizational Admin or Fund Admin

Once an application form has been created, it can be saved as a template. These templates can be editable and/or automatically added to all new opportunities, if desired. The application form templates can be managed and created from *Award Management>Form Templates*.

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Forms tab**.
4. Click the **(Edit icon)** next to an application form name.

5. Click **Save as Template**.

6. In the pop-up window, add **Template Name**.
7. Add a template **Description** (optional).
8. Check the **Add template to all new opportunities checkbox** to add the template to all new opportunities that are created. The template can be reordered or deleted from each opportunity.
9. Check the **Allow editing on opportunity checkbox** to allow users to edit the template on each opportunity.
10. Click **Save as Template**. The template can be viewed, edited, copied, or deleted from the *Form Templates* list.



Icons

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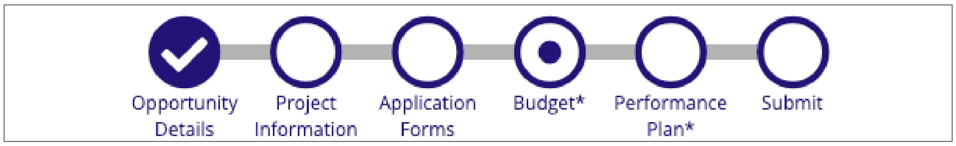
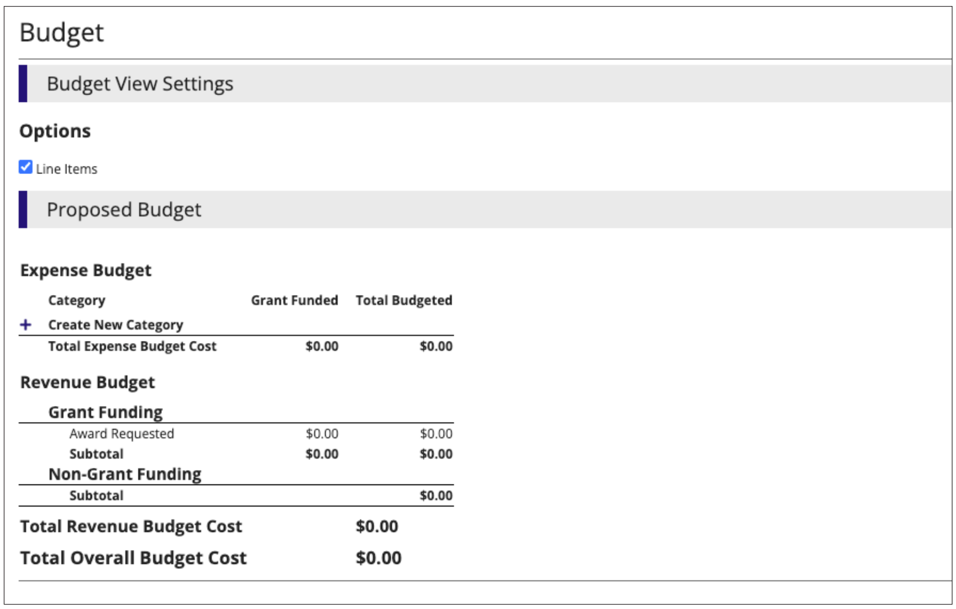
Budget Template

Budget Templates allow you to provide applicants with budget categories, if desired. These categories link back to your organization's budget categories and applicants will add line items to the categories. Based on the application settings, applicants can or must use the provided template, they may create their own budget, or they do not have to provide a budget. Purpose areas can also be added to each category.





How To Configure Budget Template Settings

The Budget portion of the application can be available, required, or hidden. Applicants may be allowed to create their own budget categories in addition to using budget categories provided in the template.

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

Application Configuration

4. Configure the Budget template by selecting from the following checkboxes:
   - **Show Budget:** The Budget section of the application is available but not

required for submission.

- **Applicants can propose categories:** Select this checkbox if you want your applicants to be able to propose their own budget categories.
- **Budget required:** The Budget section of the application is required for submission.
- **Show match:** Select to show **Cash Match** and/or **In-Kind Match** on the application's Project Information, Budget, and budget line items. This setting will only be available if *Matching Requirement* is set to **Yes** on the *Details tab*.
- **Budget narratives required:** Applicants are required to submit a Budget narrative when they submit a proposed budget.

5. Click **Save**.

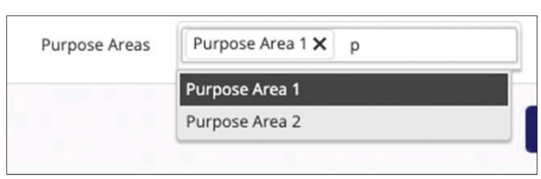
How To Add a Category

6. Click an **opportunity name**.
7. Open the **Budget tab>Budget Template**.
8. Click the **+ (Create icon)** in the *Icon Bar*.
9. Select a **Category**. This pulls from *Administration>Lists>Budget Categories*.
10. Add a **Description** (optional).
11. Select if the category is **Non-Grant Funded**.
12. Select **Purpose Areas** (optional). This pulls from your organization's purpose areas in *Administration>Lists>Purpose Areas*
13. Click **Save**.

How To Add Purpose Areas to Budget Template Categories

Once you add purpose areas to the budget category, the applicant can allocate their line item across the purpose areas.

1. Open **Award Management>Fund Opportunities**.
2. Click an **opportunity name**.
3. Open the **Budget tab>Budget Template**.
4. Click the **(Edit icon)** next to a category name.
5. In the pop-up, add Purpose Areas. This pulls from your organization's purpose areas in *Administration>Lists>Purpose Areas.*



Icons

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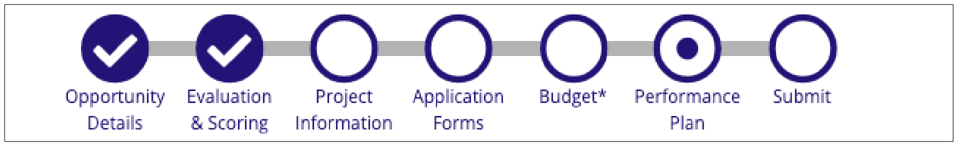
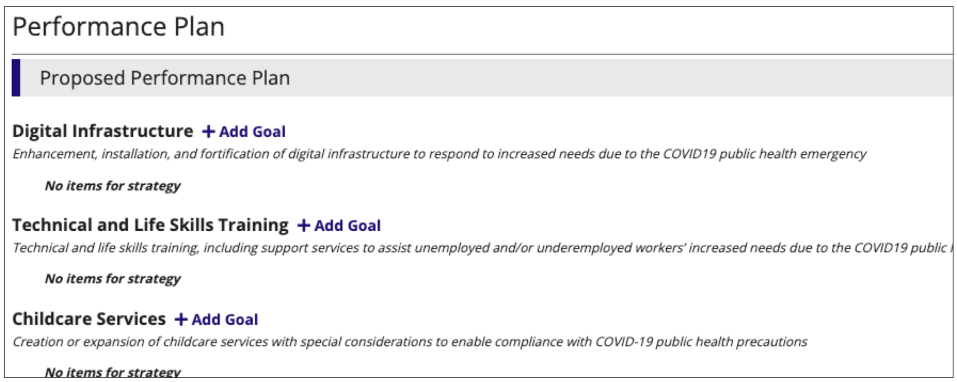
Performance Plan Template

Performance Plan Templates allow you to provide applicants with performance strategies and available performance goal types, if desired. Based on the application settings, applicants can or must use the provided template, or they do not have to provide a performance plan.





How To Configure Performance Template Settings

The Performance Plan portion of the application can be available, required, or hidden.

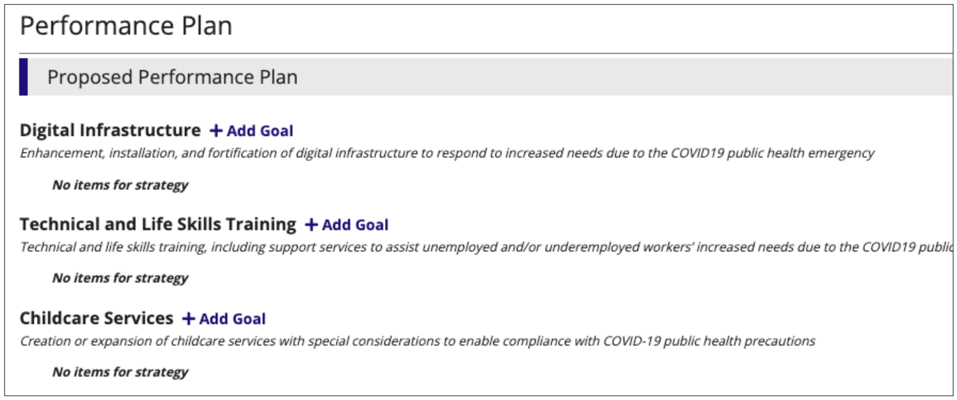
1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Performance tab>Performance Plan Settings**.

Application Configuration

4. Configure the Performance Plan Template by selecting from the following checkboxes:
    - **Show Performance Plan:** If you select this box, the Performance Plan section of the application is available but not required for submission. **Performance Plan Required:** If you select this box, that means that applicants must submit a performance plan with their application.
5. Click **Save**.

How To Add a Strategy to the

Performance Plan Template



1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Performance tab>Performance Plan Template**.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. Add a strategy **Title**.
6. Add a **Description** (optional).
7. Select if adding goals to the strategy is **Required**.
8. Select **Available Goal Types**. See **Goal Types** for more information.
9. Click **Create**.

How To Reorder Performance Strategies on Performance Plan Template

Performance strategies will appear on the Applicant Portal in the same order as listed on *Configuration tab > Performance Plan Template.*

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Performance tab>Performance Plan Template**.
4. Use the **(Move Up)** or **(Move Down)** icons next to a form name to change the form order.

Note
Strategies can also be reordered by drag and drop.

Scoring and Review Settings

Scoring parameters and review workflows should be set up before the opportunity is published. Reviewers can view and download applications, including any reviewer-only fields and all application materials; score fields; and provide comments. For information about the application reviewer's role and tasks, see the **Application Reviewer Guide**.

Icons

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Note

Application Settings will be locked once applications are submitted to the opportunity.

Application Scores

Score settings include score scale, scoring categories, score editing permissions, multiple round scoring, score outliers and score visibility settings.

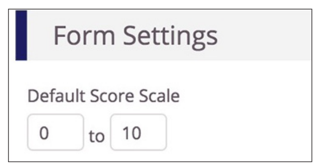
How To Set Default Score Scale

Score scale can be set as a default for the application and can be set individually on each application form field. The default score scale will auto-populate each field score scale.

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

Form Settings

4. Set minimum and maximum scores for **Default Score Scale** (i.e. scale from 0-10).



5. Click **Update**.

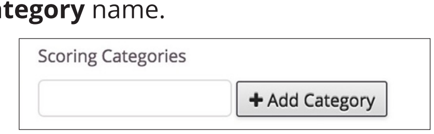
How To Add a Scoring Category

Scoring categories allow you to group multiple field response scores into an overarching category. Category scores can be viewed in total and by average. Scoring categories can be selected on each application form field.

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

Form Settings

4. Add a **Scoring Category** name.



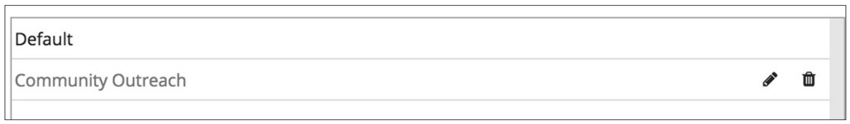
5. Click **+ Add Category**. The category will appear in the box below.
6. Click **Update**.

How To Delete a Scoring Category

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

Form Settings

4. Click a **scoring category name**.
5. Click the **(Delete icon)** next to a name.



6. In the confirmation pop-up window, click **Delete**. If the category has been applied to any application form fields, they will automatically be reassigned to the Default category.
7. Click **Update**.

How To Ignore Score Outliers

For application evaluations that include multiple scorers, outliers may be ignored from the score totals and averages. This will exclude the highest and the lowest score from each application's calculated averages.

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

Scoring Information

4. Select to **Ignore Score Outliers**.

5. Click **Update**.

How To Set Scorecard Visibility

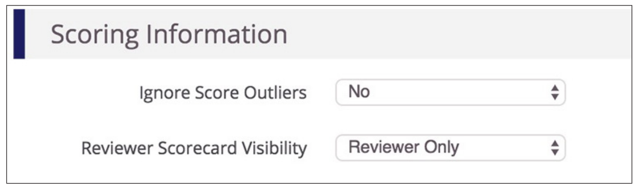
Once an application has been scored, a system-generated scorecard populates with the scoring averages, scores by category, and more. The scorecard may show each scorer only their scores or everyone's scores.

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.

2. Click an **opportunity name**.
3. Open the **Configuration tab>Application Settings**.

Scoring Information

4. Select **Reviewer Scorecard Visibility**.
    - **All Reviewers:** Show each reviewer all scores
    - **Reviewer Only:** Show each reviewer only their own scores



5. Click **Update**.

How To Hide Budget Information from Reviewers

Application budget information can be hidden from reviewers in Euna Grants and when downloading the application PDF. It will be omitted from all scores.

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

Scoring Information

4. Select **No** for *Show Budget Details*.
5. Click **Update**.

How To Allow Reviewers To Edit Scores and Comments

Organizational Admin, Fund Admin, and Opportunity Managers can edit scores and comments for all reviewers at any time, regardless of application settings.

This feature allows reviewers to edit their own scores and comments after submission. If there are multiple rounds of scoring, only the current round's scores and comments can be edited.

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

Scoring Information

4. Select **Yes** for *Allow Edits After Submission*.
5. Click **Update**.

How To Configure Multiple Rounds of Scoring

Prerequisite: You must have a workflow set up with multiple workflow queues, one for each scoring round.

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

Scoring Information

4. Select **Yes** for *Multiple Scoring Rounds*.
   a. To show reviewers scores and comments from the most recent round, select **Yes** for *Show Previous Scores and Comments*.
   b. Select how **Scoring Per Round** will be calculated.
      - **Average:** the average of all reviewer scores for the round (i.e. if the scores were 5 and 15, the round score would be 10)
      - **High Score**: the highest reviewer scores for the round (i.e. if the scores were 5 and 15, the round score would be 15)
      - **Low Score:** the lowest reviewer scores for the round (i.e. if the scores were 5 and 15, the round score would be 5)
      - **Total Score:** the sum of all reviewer scores for the round (i.e. if the scores were 5 and 15, the round score would be 20)
   c. Select how **Scoring Overall Total** will be calculated.
      - **Average:** the average of all round scores (i.e. if the round scores were 20 and 40, the overall score would be 30)
      - **Final**: the last round score (i.e. if the round scores were 20 and 40, the overall score would be 40)
      - **Total:** the sum of all round scores (i.e. if the round scores were 20 and 40, the overall score would be 60)
5. Click **Update**.

Icons

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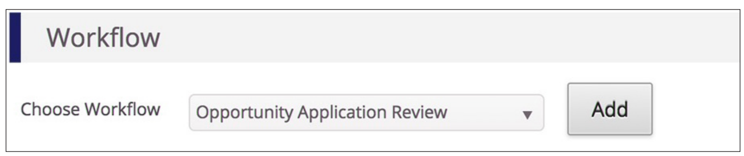
Workflow Settings

One or more defined workflows can be assigned to an opportunity. 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**.

How To Add a Workflow to an Opportunity

Any Opportunity Application workflow type can be assigned to an opportunity.

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Configuration tab>Workflow Settings**.
4. Select a **workflow** from the *Choose Workflow* dropdown. This list pulls from *Administration>System Administration>Workflow* (Opportunity Application workflow type only).



5. Click **Add**.

How To Edit an Assigned Workflow

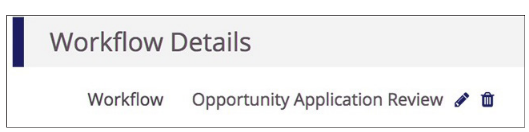
After a workflow has been assigned to an opportunity, that workflow may be updated through the opportunity or through the Administration module by Organization Administrators.

Prerequisite: Opportunities cannot be currently enrolled in workflow.

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

Workflow Details

4. Click the **(Edit icon)** next to a workflow.



5. Click the **(Edit icon)** in the *Icon Bar*.
6. Update the information as necessary.

7. Click **Update**.

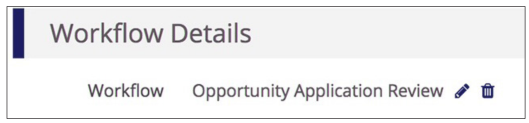
How To Remove a Workflow from an Opportunity

Prerequisite: Workflows cannot be previously or currently used on the opportunity.

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

Workflow Details

4. Click the **(Delete icon)** next to a workflow.



How To Assign Users to Workflow Actions

Once a workflow has been assigned to an opportunity, users can be assigned workflow actions. This allows you to assign users actions for the specific opportunity, such as assigning reviewers to each workflow so that a subset of reviewers can score or review selected applications.

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

Workflow Details

4. Click the **> (arrow icon)** next to a workflow queue to show queue actions.

5. Click an **action name**.

6. In the pop-up window, select a **User**. This list pulls from *Administration>System Security>Users*.

7. Click **Add**.

Testing and Publishing

Before you publish and share an opportunity, your organization's users can view and test the entire application process. We also recommend you use our **Opportunity Publication Checklist** before publishing. Once published, the opportunity can be made available to applicants.

Icons

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Testing Opportunities

Before publishing, your organization's users can preview and test the application process, including viewing and submitting applications in the Applicant Portal, enrolling and assigning workflows, reviewing and scoring applications, and selecting recipients and creating awards from the opportunity.

For more information on submitting applications, see the **Euna Grants Applicant Portal Guide**. For more information on reviewing and scoring applications, see the **Euna Grants Application Reviewer Guide**. For more information on workflow enrollment, see the **Euna Grants Workflow User Guide**.

How To Test an Opportunity

Prerequisite: Submission close date and archive date cannot have passed.

Once test applications have been submitted, you can also test enrolling in workflows, reviewing and scoring, and creating awards.

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **unpublished opportunity name**.

Opportunity Information

3. Click the **Public Link**. This will take you to a preview of your application. From this preview, you can submit test applications. See the **Euna Grants Applicant Portal Guide** for more information on applying to opportunities.

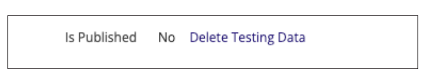
How To Delete Test Data

Test data, including test applications, scores, and awards, can be deleted prior to publishing the opportunity.

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **unpublished opportunity name.**

Opportunity Information

3. Click **Delete Testing Data** next to *Is Published*.



4. In the confirmation pop-up window, click **Delete**.

Icons

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Publishing Opportunities

Once published, the opportunity will be visible on the Applicant Portal between the opportunity's Posted Date and Archive Date. The application forms, budget templates, and performance plan templates cannot be edited while the opportunity is published.

Before you publish, we recommend that you complete the following items (also available as a printable **Opportunity Publication Checklist** in the Appendix).

- Review all information on Opportunity Details
- Review application forms, budget template and performance template content
- Review visibility for opportunity details, budget template, performance template, and application forms. (Budget template and performance template visibility can be set on *Configuration tab>Application Settings*)
- Review application forms as an applicant and as a reviewer
- Review scoring scales for all application form fields
- Review workflow set up, enrollment, and user assignments
- Test the opportunity
- Delete any test data
- Publish opportunity (on *Details tab*)

How To Publish an Opportunity

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click the **(Edit icon)** next to an unpublished opportunity name.

Opportunity Information

3. Check the **Is Published checkbox**.

4. In the confirmation pop-up window, click **Yes**.
5. Click **Save**.

How To Unpublish an Opportunity

Unpublishing an opportunity will remove it from the Applicant Portal. You should only unpublish an opportunity if applicants have not started or submitted applications, or if there is misinformation on the Fund Opportunities Details page that must be removed or changed before applications may be submitted.

Warning
Unpublishing will delete any applications that have been started or submitted.

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click the **(Edit icon)** next to a published opportunity name.

Opportunity Information

3. Uncheck the **Is Published checkbox**.

4. In the confirmation pop-up window, click **Yes**.
5. Click **Save**.

How To Delete an Opportunity

Prerequisite: Applications cannot be started or submitted.

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click the **(Delete icon)** next to an opportunity name.

3. In the confirmation pop-up window, click **Delete**.

Icons

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Sharing Opportunities

Once published, the opportunity's public link will be available to applicants. If the opportunity is public, the opportunity will also be listed with all your organization's available public opportunities. You can also allow your organization's staff to apply to the opportunity.

Public Link

The public link is only active for applicants once the opportunity has been published. For a private opportunity, we recommend that you send email the link directly to applicants. For public opportunities open to any applicant, the link may be posted on a website for easy access.

How To Share All of Your Available Opportunities

In addition to the opportunity-specific public link, you can share a link to a list of all your available opportunities.

1. Open **Administration >License Information**.

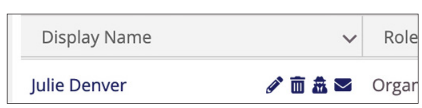
Product And Licensing Information

2. Copy the **Public Link**.

How To Allow Internal Applicants

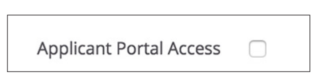
If your opportunity permits, your organizations internal staff can apply to the opportunity. Once an application has been started, staff can access their applications from *Euna Grants>User Navigation Menu>Applicant Portal*. The User Navigation Menu can be accessed by clicking the user’s name in the top-right corner of Euna Grants.

1. Open **Administration>System Security>Users**.
2. Click the **(Edit icon)** next to a user name.



User Information

3. Check the **Applicant Portal Access checkbox**.



4. Click **Update**.

Receiving Applications

As applicants submit their applications, the applications can be viewed and downloaded, enrolled in workflows, reviewed and scored, and awards can be created.

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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**.

Note
The application's context-specific tabs are different than the opportunity's tabs.

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.

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

Note
Applicants will receive email notifications whenever there is a status change to their application, including workflow queue status changes. Emails are sent from no-reply@Euna Grants.com.

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.

Note
Once Pass Review is marked as **Yes**, the review cannot be edited..

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**.

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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.

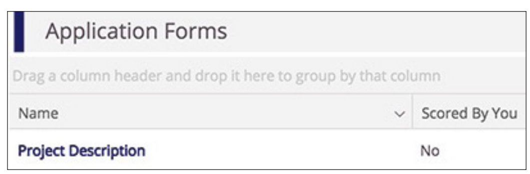
The Score Application workflow action allows users to score and comment on application materials.

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

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

Application Forms

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



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**.

Note

If multiple round scoring is enabled, you may see your previous round's scores and comments for reference, depending on the scoring settings.

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**.

How To View Your Scores

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

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.

Note
If there are multiple rounds of scoring, you can only edit scores for the current 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**.
6. Click the ✎ **(Edit icon)** next to your comments.

Icons

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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

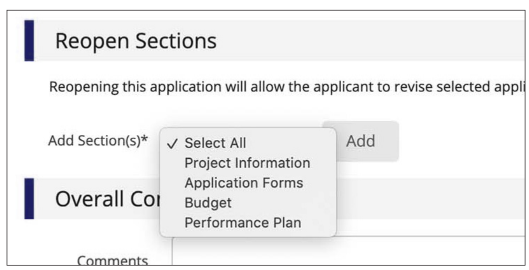
Applications can be reopened by sending the application to a workflow queue that has the workflow action to Change Submission Status to Reopened.

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**.

Note

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



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.

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.

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

Icons

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Reviewing Scores

Once the fund opportunity's applications have been reviewed, you can view your scores and all scores for the applications. From the *Opportunity Review tab*, you can also access application details and the applicant's primary contact information.

How To View All Application Scores

The average scores for all applications are listed on the *Applications tab*.

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

How To View Application Scorecard

Once the application has been reviewed, application category scores and scoring comments can be viewed on a system-generated scorecard. Depending on the application settings, this card may show all reviewers' or the individual reviewer's scores.

1. Open **Award Management>Fund Opportunities** or **>Grant Opportunities**.
2. Click an **opportunity name**.
3. Open the **Applications tab**.
4. Click **application name.**
5. Open the **Scorecard tab**.
6. Click **My Reviews** in the top-right of the page to view your reviews or click **All Reviews** to see all (if application settings allow).

Icons

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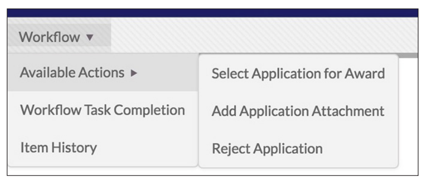
Awarding from Applications

Grant or fund awards can be created from opportunities.

How To Create a Fund Award from an Application

Prerequisite: The application must be in the Final Review workflow.

1. Open **Award Management>Fund Opportunities**.
2. Click an **opportunity name**.
3. Open the **Opportunity Review tab**.
4. Click an **application name**.
5. Open the **Workflow tab>Available Actions>Select Applicant for Award**.



Award Information

6. Select your organization's **Responsible Person** for the award (optional). Funder Responsible Persons are responsible for overseeing an awarded grant. These users can edit award details; performance plans, achievements and settings; and budgets, expenses, and settings. They can also view items related to their award. This list pulls from *Contacts>Staff*.
7. Select your organization's **Grant Manager**. Funder Grant Managers have full access to edit grant details, and create, edit, and delete all items related to their awarded grant. The Funder Grant Manager may also assign responsibility for goals and line items to the Recipient Grant Manager. From there, the Recipient Grant Manager can reassign responsibility to others in their organization. This list pulls from *Contacts>Staff*.
8. Add an **Award Identification Number** (optional).
9. Add an **Award Name** (optional)
10. Select the **Awarded Date**. This is the date the award will be given to the recipient.
11. Add the **Length of Award** in full years and any additional months.
12. Select the award **Start Date**. The End Date will populate automatically based on the award Start Date and Length of Award.
13. Add an award **Description** and **Unique Identifier** (optional).
14. Select the record *Status* as **Enabled**. This will create an enabled Fund Award record in your Euna Grants account.

Funding Information

15. Add **amounts** from each a funding source. These will add to the *Total Awarded Amount*.

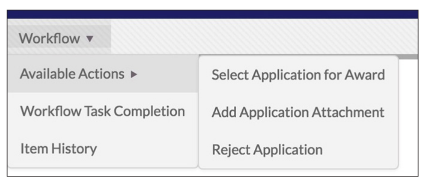
Workflow

16. Add **Comments** (optional). These comments will not be shared with applicants.
17. Click **Create**.

How To Create a Grant Award from an Application

Prerequisite: The application must be in the Final Review workflow.

1. Open **Award Management>Fund Opportunities**.
2. Click an **opportunity name**.
3. Open the **Opportunity Review tab**.
4. Click an **application name**.
5. Open the **Workflow tab>Available Actions>Select Applicant for Award**.



Award Information

6. Select your organization's **Responsible Person** for the award (optional). Funder Responsible Persons are responsible for overseeing an awarded grant. These users can edit award details; performance plans, achievements and settings; and budgets, expenses, and settings. They can also view items related to their award. This list pulls from *Contacts>Staff*.
7. Select your organization's **Grant Manager**. Funder Grant Managers have full access to edit grant details, and create, edit, and delete all items related to their awarded grant. The Funder Grant Manager may also assign responsibility for goals and line items to the Recipient Grant Manager. From there, the Recipient Grant Manager can reassign responsibility to others in their organization. This list pulls from *Contacts>Staff*.
8. Add an **Award Identification Number** (optional).
9. Select the **Awarded Date**. This is the date the award will be given to the recipient.
10. Add the **Length of Award** in full years and any additional months.
11. Select the award **Start Date**. The End Date will populate automatically

based on the award Start Date and Length of Award.

12. Add an award **Description** and **Unique Identifier** (optional).
13. Select the record *Status* as **Enabled**. This will create an enabled Fund Award record in your Euna Grants account.

Funding Information

14. Add **amounts** from each a funding source. These will add to the *Total Awarded Amount*.

Workflow

15. Add **Comments** (optional). These comments will not be shared with applicants.
16. Click **Create**.

Appendix

Goal Types

Goals may be quantified using six different types. The goal types allow staff to track progress based on the planned item.

Milestone	Milestone goals are the most basic goal type. They allow for tracking progress as a "Yes" or "No" response by the responsible staff member. An example of a milestone goal is "Create and send Q1 Staff Survey."
Narrative	Narrative goals are question and answer goals. Responsible staff members may answer the question posed by the goal. An example of a narrative goal is "How successful was the grant-related activity this period?"
Numeric	Numeric goals are a discrete number to achieve. As units of the goal are completed, staff may record units completed. An example of a numeric goal is "number of program participants" with a goal target of 50.
Percent Achieved	Percent achieved goals are goals to reach a desired percent. When tracking progress against a percent achieved goal, staff may capture Total Possible and Total Achieved percentages. An example of a percent achieved goal is "Volunteer Retention Rate" with a goal target of 70%.
Percent Change	Percent change goals are goals to track a percent increase or decrease. Percent change goals are defined with a starting percent and a desired percent. When tracking progress against a percent change goal, staff may capture Total Possible and Total Achieved percentages. An example of a percent change goal is "Decrease in Student Absences" with a starting absentee rate of 10%, and a goal absentee rate of 3%.
Reimbursement	Reimbursement goals are goals with a discrete unit to achieve, and a dollar rate associated per unit. When tracking progress against a reimbursement goal, staff may enter Units Achieved. An optional checkbox field appears on each reimbursement goal type labeled "Add as budget item." If the goal is added as a budget item, the reimbursement goal will appear as part of the grant's expense budget. If a reimbursement goal is shown on the grant budget, any updates made to the goal through the performance plan will automatically update the budget. An example of a Reimbursement goal is "Number of Patient Screenings" with target/maximum units of 100, and a reimbursement rate per unit of $22. Reimbursement goals are used to support pay for performance grants.

Opportunity Publication Checklist

Once published, the opportunity will be visible on the Applicant Portal between the opportunity's Posted Date and Archive Date. The application forms, budget templates, and performance plan templates cannot be edited while the opportunity is published.

Before you publish, we recommend that you complete the following items:

- [ ] Review all information on Opportunity Details
- [ ] Review application forms, budget template and performance template content
- [ ] Review visibility for opportunity details, budget template, performance template, and application forms. (Budget template and performance template visibility can be set on *Configuration tab>Application Settings*)
- [ ] Review application forms as an applicant and as a reviewer
- [ ] Review scoring scales for all application form fields
- [ ] Review scoring settings (per round and total scores, if applicable)
- [ ] Review workflow set up, queues for each round of scoring (if applicable), enrollment, and user assignments
- [ ] Test the opportunity
- [ ] Delete any test data
- [ ] Publish opportunity (on *Details tab*)