Social Innovation Fund Classic Grant Competition
Creating an Application in eGrants

CONTENTS

Introduction

This document is intended to illustrate the eGrants guidance provided in the application instructions. Detailed guidance of what to include in the application is contained in the Notice of Federal Funding Availability (Notice) and the application instructions (provided as an appendix within the Notice). Click **FY 2016 Social Innovation Fund Classic Cooperative Agreements** on the list of Current Funding Opportunities on the Corporation for National and Community Service (CNCS) website (http://www.nationalservice.gov/build-your-capacity/grants/funding-opportunities).

Note: Screenshots in this presentation are provided for illustrative purposes only. The content of screenshots should not be interpreted as formal guidance from the Corporation.

Preparing to Submit Your Project

Submitting a project through eGrants isn't always intuitive, so we have developed this short guide to help you prepare and navigate some of the complexities involved. Please spend a few minutes reviewing the information here before you get started, and keep a copy (or open browser window) by your side as you complete your application. If you have questions along the way, see the end of this document for contact information for the Help Desk.

Submitting a project will require that you provide the following information and complete these steps:

1. Create an eGrants account
2. Create accounts for authorized users
3. Create a new project
4. Enter project applicant information
5. Enter application info
6. Enter narratives
7. Send documents and record status in eGrants
8. Develop and enter the project budget (Sections 1 and 2), including subsidiary budgets
9. Review your application
10. Authorize and submit

Creating eGrants Accounts

Create an eGrants Account for Your Organization

The first step will be to create an account for your organization on eGrants, if you do not already have one. If you are the first person in your organization to access eGrants, you will automatically become the account administrator. Being the administrator means you are responsible for approving account access for other staff/authorized users and assigning their roles.

- Go to eGrants (http://www.nationalservice.gov/build-your-capacity/grants/egrants) then click the blue button labelled **eGrants Log-in**.
- Click **Don't have an eGrants account? Create an account** (Figure 1).

Figure 1: eGrants login screenshot

- On the next screen, click **Create a Grantee account** (Figure 2).

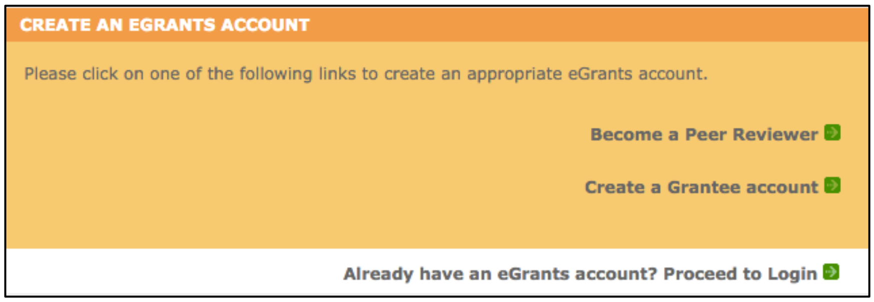

Figure 2: Create an eGrants account screenshot

- Next, click **This is my first time. I want to create a new account with eGrants...** (Figure 3).

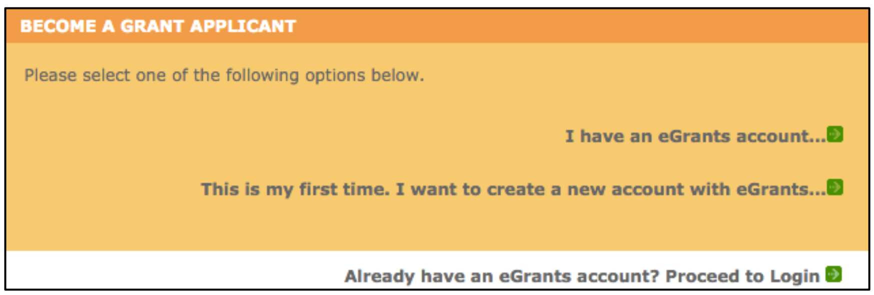

Figure 3: Become a grant applicant screenshot

- The next screen is "Login Information." Complete the fields by entering your name, phone number, and email address.

  Note: Your organizational information is entered later in a separate step.

- On this page, you will need to select your username and password. To enhance the security of your eGrants account, your password must include at least:
  - 12 characters
  - 1 upper case character

- 1 numerical character
- 1 special character, e.g., !@#$%^&*()

Some tips for selecting a password are as follows.

- Should not contain a dictionary word
- Should not contain any proper noun or the name of any person, pet, child, fictional character, or any information that could be readily guessed about you (birth date, telephone number, employee number, SSN, etc.)
- Should not contain any simple pattern of letters or numbers, such as "xyz123" or which are easy to type.

- When the form is complete, click **Next**.
- On the following screen, you will need to open the orange link and read the System Rules of Behavior pdf document. Then, click in the box to indicate your acknowledgement of the four items listed (Figure 4). Click **Next**.

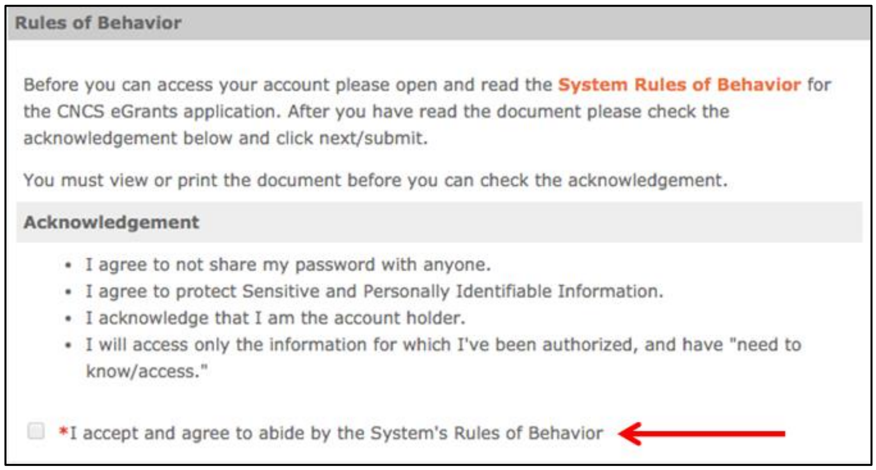

Figure 4: Rules of behavior screenshot

- Enter your organization's EIN number (Figure 5). Click **Next**.

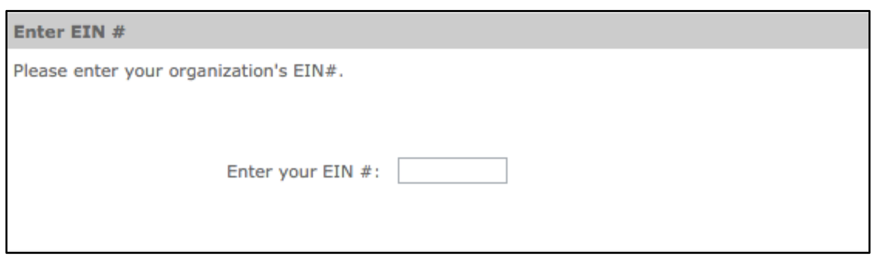

Figure 5: Enter EIN # screenshot

If you are creating a new account for your organization, you will get a message indicating no EIN match was found (Figure 6). Click **Next**.

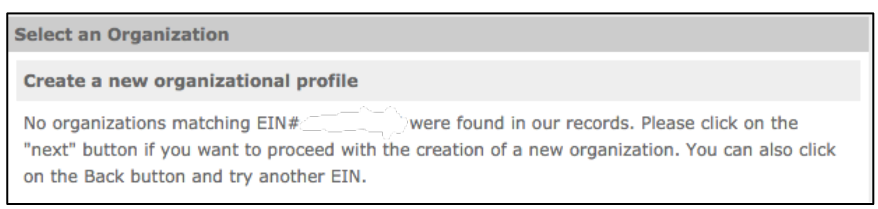

Figure 6: Create a new organizational profile screenshot

- On the following screen, enter your organization's general information including DUNS number and organization name, type, characteristics, and contact information such as the address (including Zip+4). When completed, click **Next**.

Note: The system may suggest address options from which to select such as changes to the street address and adding four digits to the zip code (Figure 7).

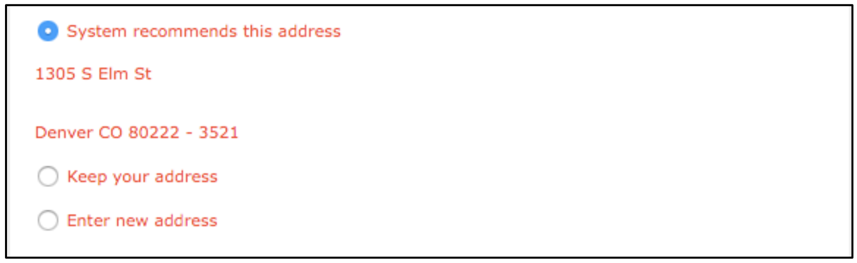

Figure 7: System clarification of address screenshot

If you have not entered a DUNS number you will receive a grey pop up message box stating the DUNS number must be entered before submitting the application.

- The next screen is the Indirect Cost Rate Record. If your organization has an established rate, select **Yes** from the drop menu and complete the other fields on the screen (Figure 8). Click **Next**.
- If you do not have an indirect cost rate, select **No**. You do not have to complete all the fields even though they look as if they are required due the orange asterisks. Click **Next**.
- On the next screen, enter the appropriate phone numbers. Click **Next**.
- The final screen allows you to review all of the entered information. Click **edit** to make changes to any section, as needed. When done, click **Submit**.

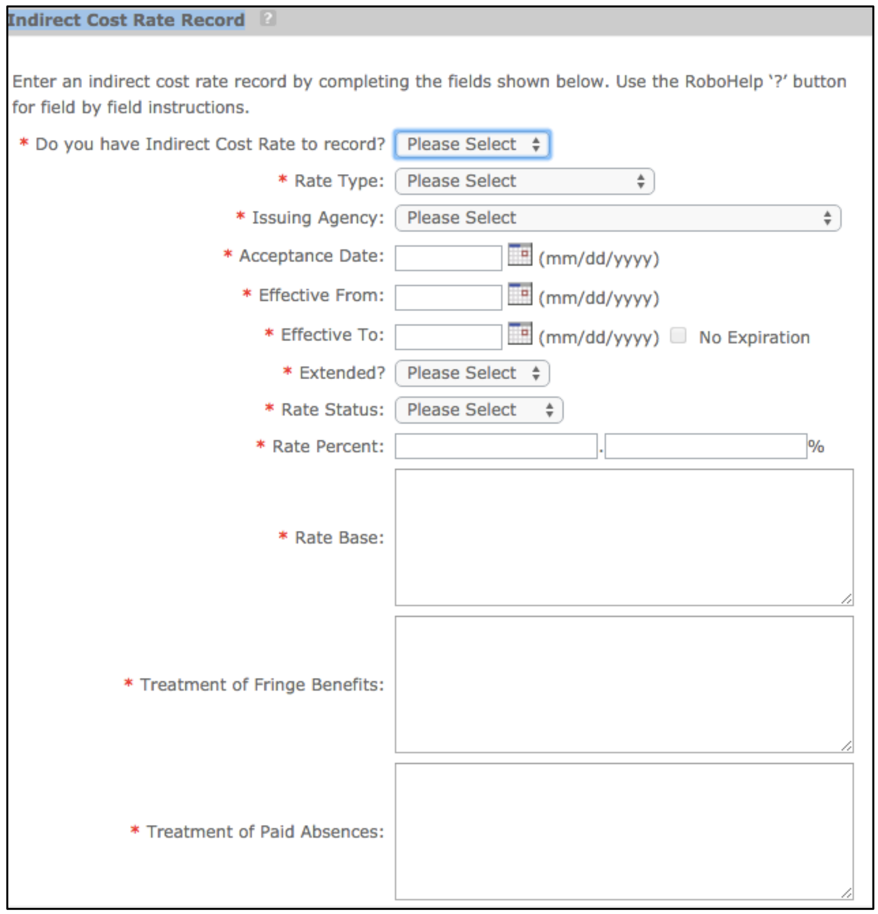

Figure 8: Indirect cost rate record screenshot

On the thank you screen (Figure 9), you have the option to go to your account homepage that has links to complete various account administrative tasks. If you want to continue creating the grant application, click **Go to eGrants Login** and enter your login information.

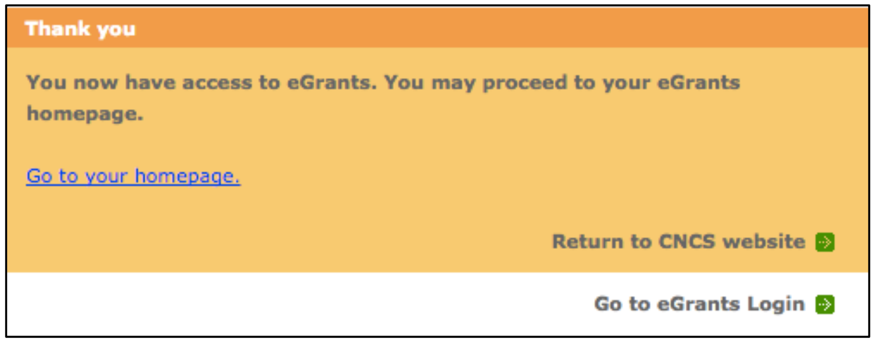

Figure 9: Account set up thank you screenshot

Note: If you are the first person from your organization to access eGrants and have created the organization's account, you are automatically designated the account administrator by the system. You will receive a system generated email acknowledging you have created an eGrants account.

Create eGrants Accounts for Authorized Users

Each staff member (including the Project Director) that needs access to eGrants (either to enter application information or provide the required assurances and certifications before submission) must register for their own eGrants account.

Note: Before entering the information to create an individual account, each staff person will need a copy of your organization's EIN to be able to link his or her profile to your organization's account.

- The process for creating individual staff profiles follows the same process outlined above, up to the screen after entering the EIN.
- After entering the organization's EIN number, the system will match the staff member's entry to the organization's account. On the next screen in the system, the person will select the bottom radio button for your organization's name (Figure 10). Click **Submit**.

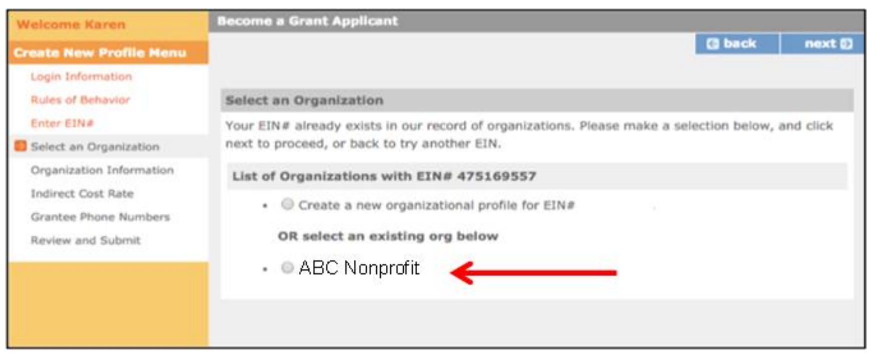

Figure 10: Select an organization screenshot

An orange thank you message will be displayed when the account that has been created is accepted.

Note: Staff won't have further access to the organization's records until you (or whoever is the Grantee Administrator for your organization) has been assigned an eGrants role.

Activate Authorized User Accounts

- After additional staff has completed the application process, the system generates an email to let you as the administrator know to login to and go to the My Account page. In the upper right box, Edit my Organization Info, click **Edit User Role/Permissions** (Figure 11). Any new user will not be able to access eGrants until you assign him or her a role.
- The name(s) of staff will be listed and you will select the radio button most appropriate of the three roles for each person:
    - grantee administrator
    - grantee [staff] with access to budget
    - grantee [staff] without access to budget.

Figure 11: Edit my organization screenshot

Note: The person in your organization who will be responsible for the Assurances and Certifications before application submission needs his/her own eGrants account and should be given a Grantee Administrator role.

Login to eGrants and Create an Application

- Go to the [eGrants login page](https://egrants.cns.gov/espan/main/login.jsp) (https://egrants.cns.gov/espan/main/login.jsp)
- Login to eGrants using your username and password.
- Select **New** in the left box to start your application (Figure 12).

Note: There is toolbar on the left side of the screen. Clicking on any of the titles will take you directly to that section. Verify your Legal Applicant Information (along the left side of the screen) is accurate.

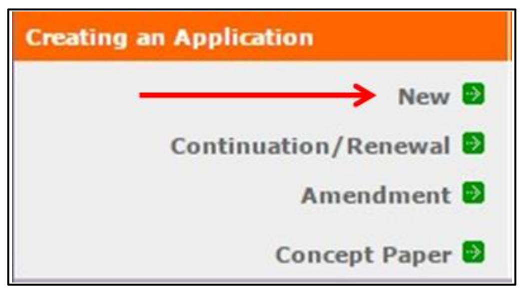

Figure 12: Create a new application screenshot

- First, select a NOFA. Select **Other** from the drop down menu, then click **Go** (Figure 13).

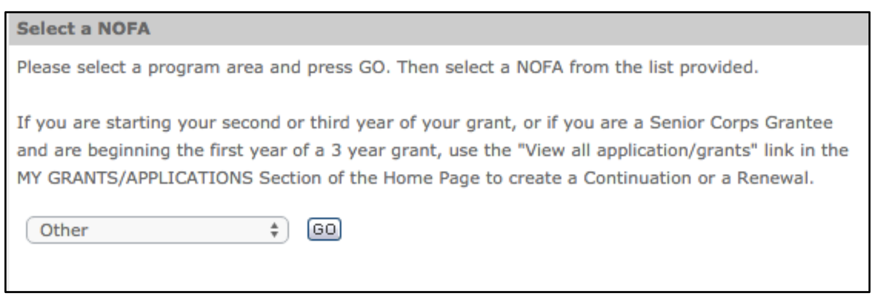

Figure 13: Select a NOFA screenshot

- Select the FY2016 Social Innovation Fund Classic Cooperative Agreement. Click **Next** (Figure 14).

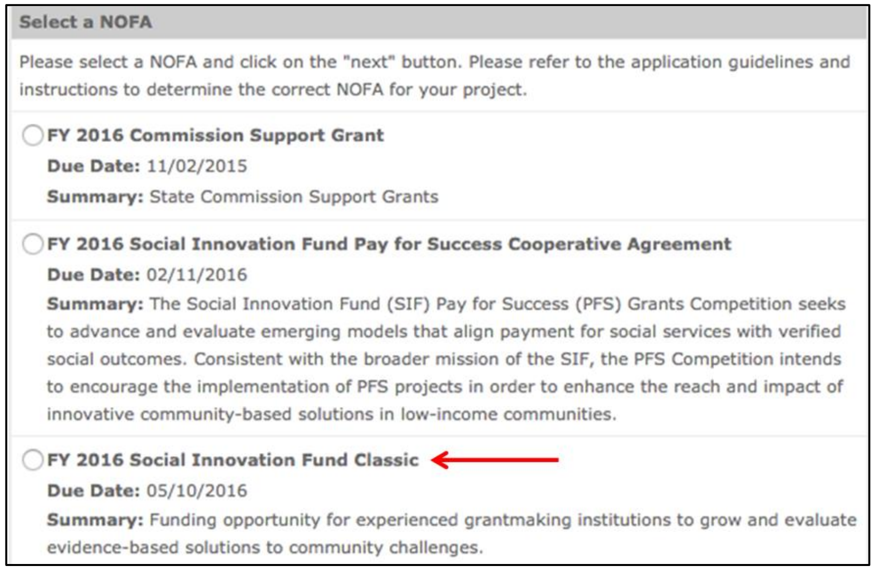

Figure 14: FY 2016 Social Innovation Fund Classic screenshot

Project Information

- Verify that you selected the correct NOFA (FY 2016 Social Innovation Fund Classic Cooperative Agreement). Click **create a new project** to continue (Figure 15).

Figure 15: Create a new project screenshot

- Fill in all fields in the **Enter/Edit a Project** *dialogue* box (Figure 16). The following bullets will help ensure that your application is complete and accurate.
    - **Project Title**: Use a project title that is suitable for print or online promotion of your initiative and would be helpful in explaining your program to external audiences.

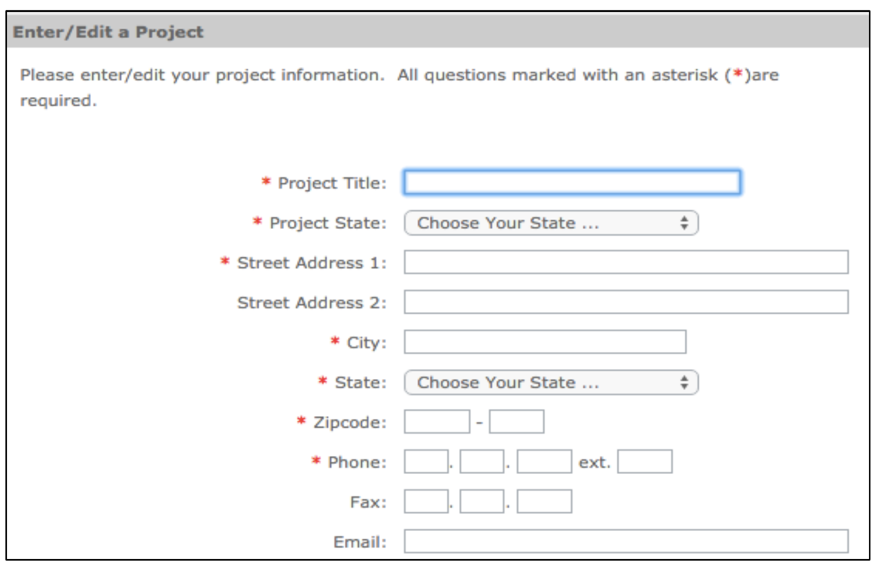

Figure 16: Enter/Edit a project screenshot

- **Project State**: Enter the state where your organization resides, even if you have partners or intend to implement your initiative in other states. The same is true for the other contact information fields.
- **Street Address**
- **Email address**: Use the email address of the primary contact person.
- **Zip code**: Enter the full Zip+4. Visit the United State Postal Service website, if you do not know yours. (https://www.usps.com/zip4/)

- Click **Save & Close** when finished.

- Click on the **Select a project** drop down menu and choose the name of the project you just created (Figure 17).
- Click on the **Select a project initiative** drop down menu and choose from the list of seven SIF options. Choose the one that best describes the type of SIF you are proposing.
- Select the name of the project director from the drop menu.

NOTE: The Project Director must have already set up an eGrants account for his/her name to be listed.

- Enter your project's web address (URL) and click **Next**.

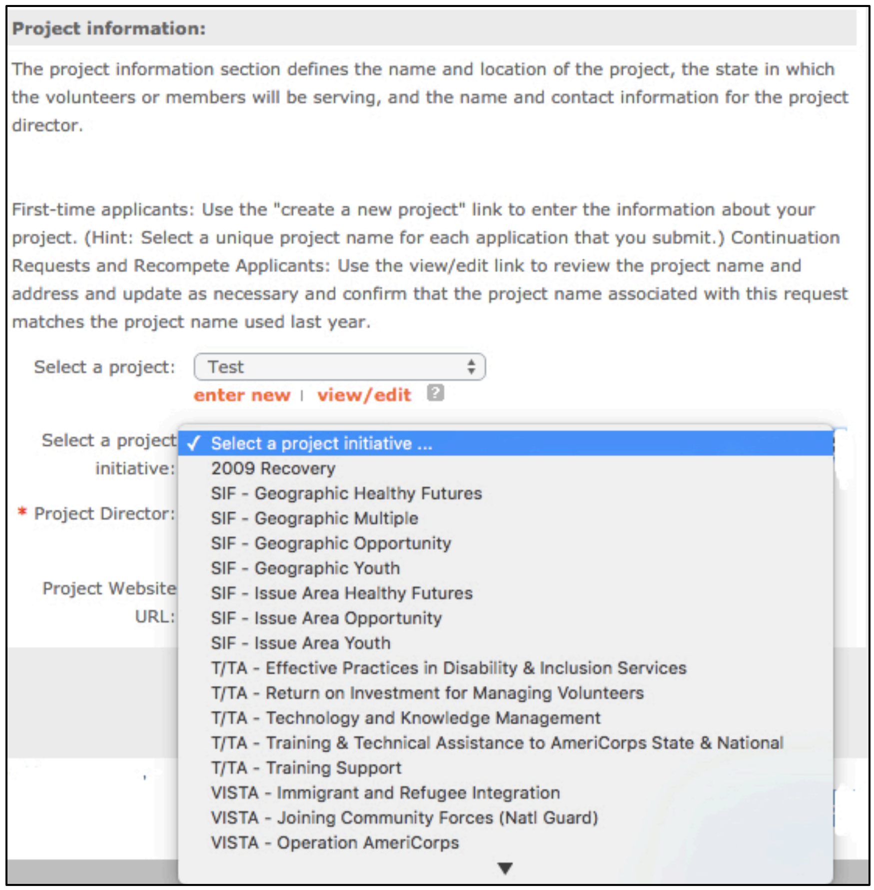

Figure 17: Project information screenshot

Application Information

- Proceed to enter information in Application Info section (Figure 18).
- This section contains general information on your application, such as geographical areas affected by the project, and proposed start and end dates.

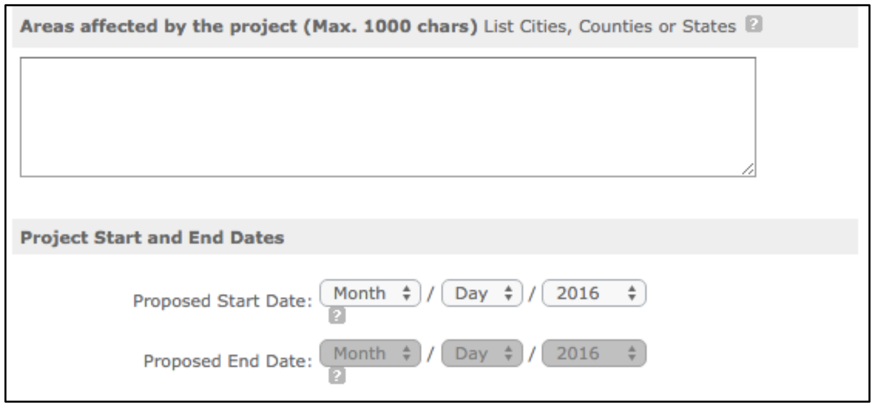

Figure 18: Application information screenshot

- Next, whether or not your application is subject to review by the State Executive Order 12372 process, and whether your organization (the applicant) is delinquent on any federal debt (Figure 19).

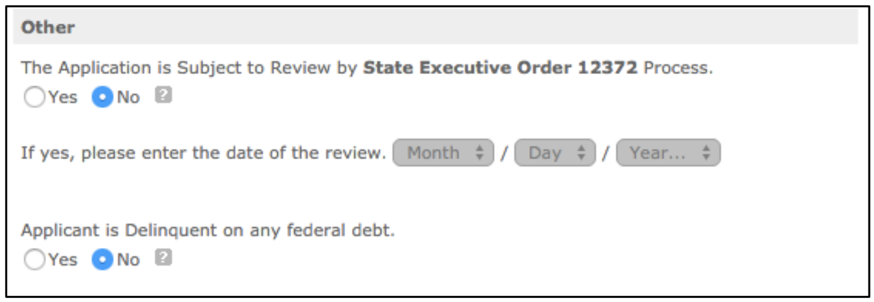

Figure 18: State Executive Order screenshot

Note: You can return to any section of your application by clicking on the section title in the left navigation bar (Figure 20).

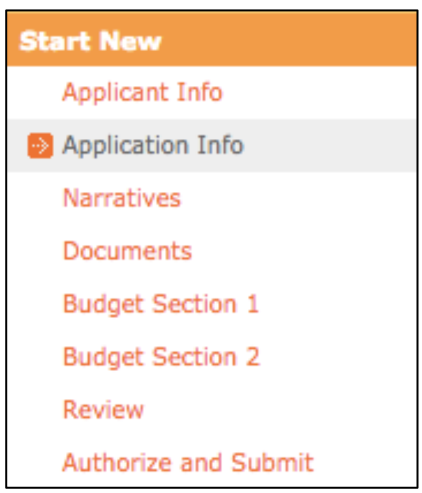

Figure 20: Left navigation bar screenshot

Narrative Information

- Enter narratives in appropriate sections. The narratives section includes six narrative fields (Figure 21). Click **view/edit narrative** to enter your information for each narrative.
- Once you have entered information in each of the narratives, a green check box will appear to the left of the section title. You must include text in each of the narrative fields in order for your application to validate.

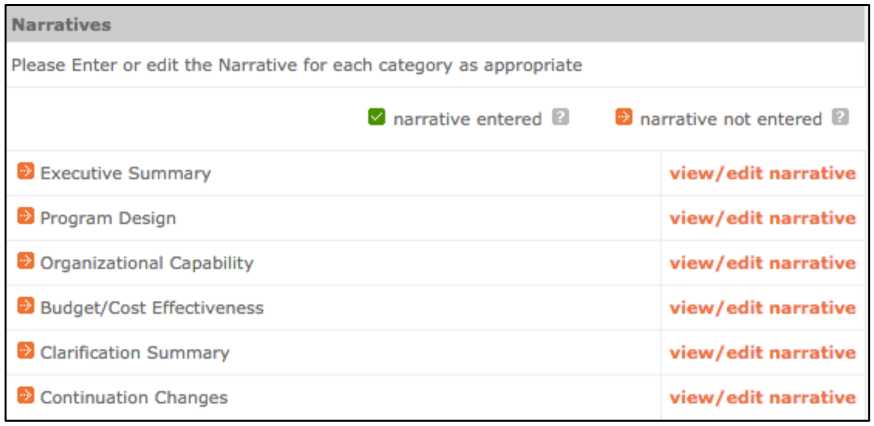

Figure 21: Narratives screenshot

Notes on Narrative Fields:

- *Always compose text for your application in a word processing application and paste it into eGrants.*
- *Maximum length of the application can be found in the Notice of Federal Funding Availability. Reviewers will be instructed to stop reading once they've reached the page limit, even if eGrants allows you to submit a longer application.*

Documents

- Match verification documents submitted directly to SIF should be entered in this section. Please see the Notice of Federal Funding Availability for information on match verification.
- Match verification letters must be sent to SIFApplication@CNS.gov; they cannot be attached through eGrants.

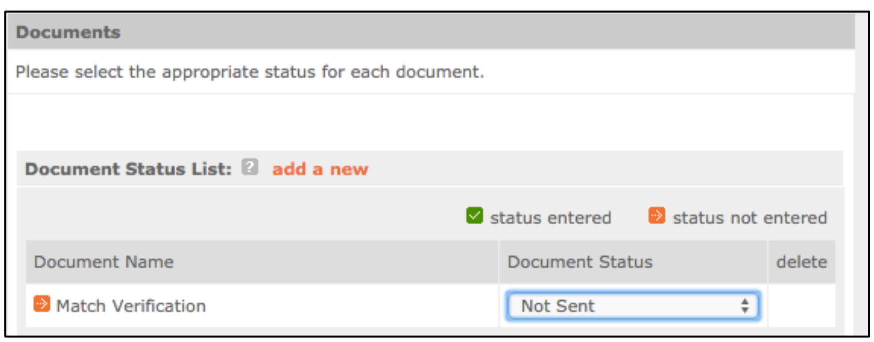

Figure 22: Documents screenshot

- Once you have sent them through email, click on the **Match Verification** drop down menu and select **Sent** from the menu (Figure 22).

Note: No additional documentation is required and other documentation will NOT be considered during application review.

Budget

See the application instructions in the Notice of Federal Funding Availability for detailed guidance on how to accurately complete the budget.

Budget Section I (Program Costs)

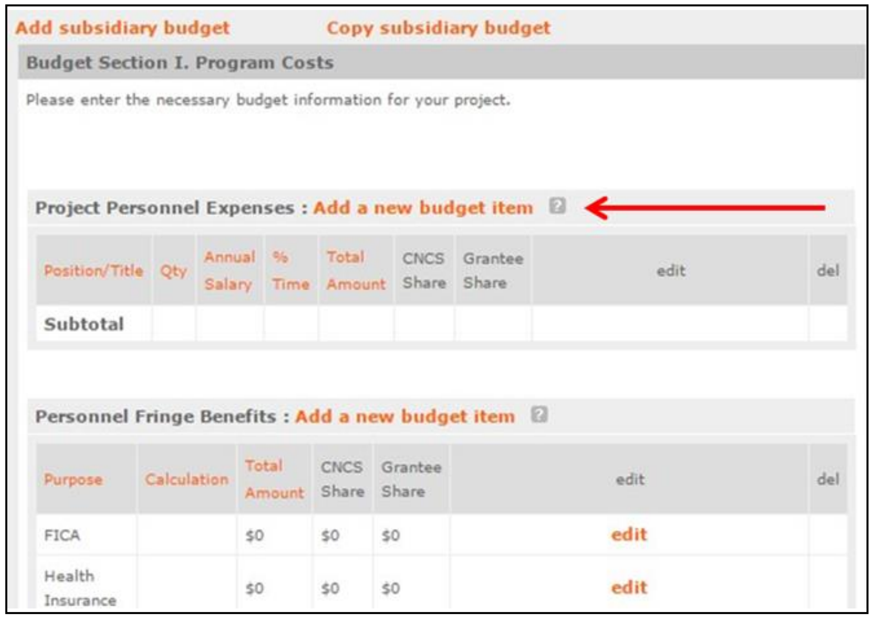

Figure 23: Budget section I program costs screenshot

- **Project personnel expenses**: Click **add a new budget item** (Figure 23). Type in the title or name of the position. Enter the number of positions with the same title/name. Enter the full-time equivalent salary for this position and the percentage of time that will be used for SIF activities. The total amount is calculated automatically. Enter the CNCS share and grantee share. Both must add up to the total amount. Click **Save & Close**. If you have multiple positions, click **add a new budget item**, as needed.
- **Personnel fringe benefits**: Click **add a new budget item**. Enter the type of fringe benefits (e.g., FICA, workers' compensation) and the position they cover. Enter the calculation used to compute the benefit. Enter in the total amount and divide between the CNCS share and the grantee share. Click **Save & Close**. If you have multiple items, click **add a new budget item** as many times as needed.
- **Travel**: Click **add a new budget item**. Enter the purpose of the travel. Enter the calculation used to compute the travel. Enter the total value for travel and divide between the CNCS share and the grantee share. Click **Save & Close**. If you have multiple items, click **add a new budget item** as many times as needed.
- **Equipment**: Click **add a new budget item**. Enter the item and/or purpose of the equipment. The application instructions explain the distinction between equipment and supplies. Enter the quantity and unit cost. The total amount is auto populated. Divide between the CNCS share and the grantee share. Click **Save & Close**. If you have multiple items, click **add a new budget item** as many times as needed.
- **Supplies**: Click **add a new budget item**. Enter the supply items. The application instructions explain the distinction between equipment and supplies. Enter the calculation used to determine the cost of these supplies. Enter the total amount for these supplies and divide between the CNCS share and the grantee

share. Click **Save & Close**. If you have multiple items, click **add a new budget item** as many times as needed.

- **Contractual and consultant services**: Click **add a new budget item**. Enter the type of contractual or consultant service. Enter the calculation used to determine the cost of these services. Enter the total amount and divide between the CNCS share and the grantee share. Click **Save & Close**. If you have other contractual and consultant services items, click **add a new budget item** as many times as needed.
- **Other costs**:
  - Subgrants - Click **edit** in the Subgrants line. Type in the total amount you plan to subgrant and divide between the CNCS share and the grantee share. Click **Save & Close**.
  - Criminal history checks and other costs - Click **add a new budget item** to add Criminal history background checks as directed in the Notice of Federal Funding Availability.
  - Follow this same process to add **evaluation costs**, **training costs**, and any additional costs. Enter the purpose and total amount for each type of cost, then divide between the CNCS share and the grantee share. Click **Save & Close**.
- **Subtotals**: This section will automatically populate based on what you entered in each of the budget sections. Click **Next**.

Budget Section II (Indirect Costs)

- Click **Enter source of matching funds** (Figure 24), enter a description and amount of the match secured for Year 1. Choose the cash match from the drop down menu.
- Choose **Match Source** from the drop down menu, enter the source of your match, and then click **Save & Close**.
- If you have other matching fund sources, click **Enter source of matching funds**, as many times as needed. Complete, and then click **Save & Close**.

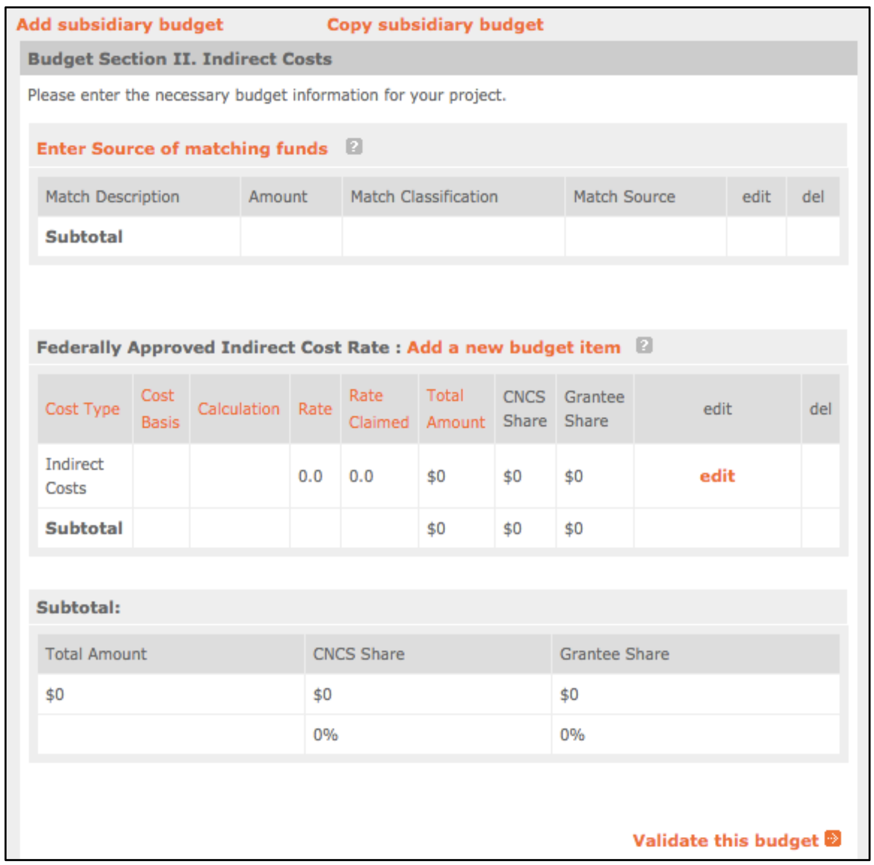

Figure 24: Budget section II, indirect costs screenshot

- The total value of the match entered here should equal the total match entered in the budget.

For more information on indirect costs rates, see the Notice of Federal Funding Availability and the SIF Classic Application Instructions.

- Click **Edit.** Choose the **Cost Type** from the drop down menu (Figure 25). The cost type options are:
  - Final
  - Fixed
  - Predetermined
  - Provisional
- Choose **Cost Basis** from the drop down menu. The costs basis options are:
  - Total Direct Costs
  - Salaries and Benefits
  - Other

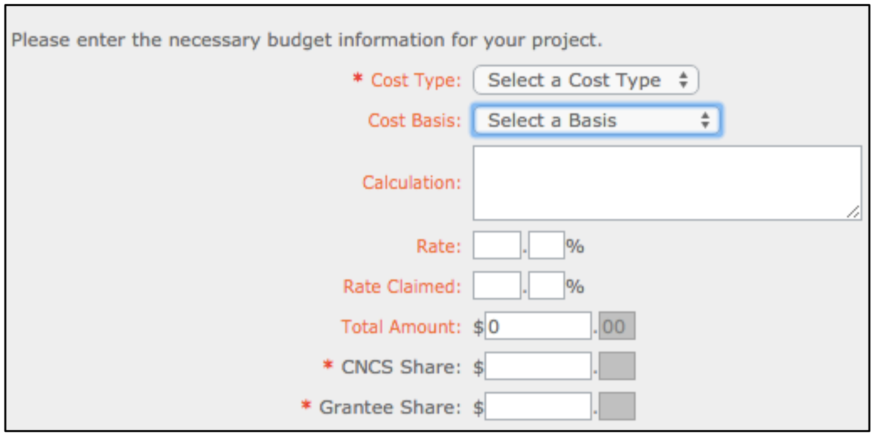

Figure 25: Indirect cost rate entry screenshot

- Enter the Calculation, Rate, and Rate Claimed. Enter the total amount and divide between the CNCS share and the Grantee share. Click **Save & Close.**

Enter Subsidiary Budgets

A 'subsidiary budget' is a budget for a future year of operations.

- Click either **Add subsidiary budget** or **Copy subsidiary budget** to create Budget Years 2 and 3 of the Application (Figure 26).

Note: By clicking Copy subsidiary budget, the Year 1 budget automatically populates in the subsidiary budget. If you want to begin the subsidiary budgets from scratch, click Add subsidiary budget.

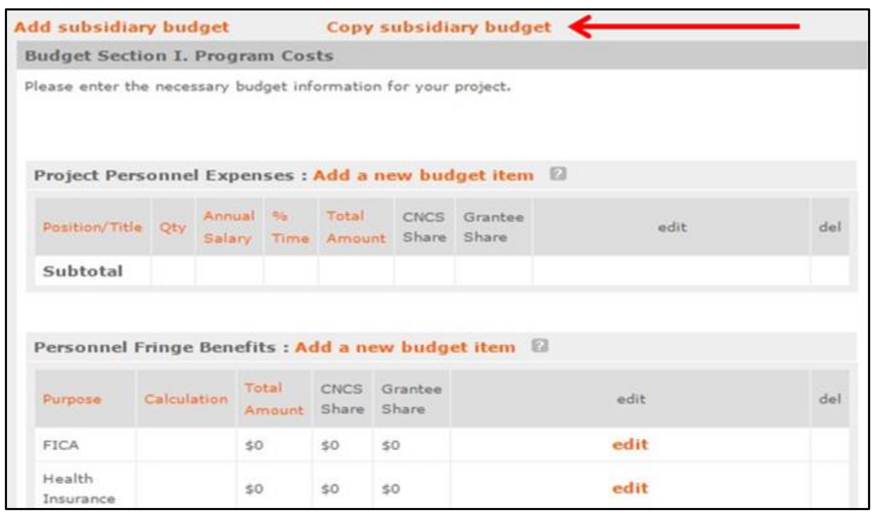

Figure 26: Subsidiary budgets screenshot

Validate Your Budget

- Once your budget is complete, click **Validate this budget**.
- If the CNCS request is more than your share (proposed matching funds), you will get an error message from eGrants stating: "Grantee share must be greater than or equal to CNCS share." If you receive this

error, click **Close** and make necessary changes until your share is greater than or equal to the CNCS share. Once you have made the necessary corrections, click **Validate this budget.**

- When your budget is validated, you will see the message: "*No budget errors were found! This budget has been validated without errors.*"

Review

- Once you have completed the application narratives and budget, you may print a copy to review prior to submission. Three documents are available to print:
  - Application for Federal Assistance (includes narratives except budget)
  - Budget
  - Budget Narrative (based on the information you entered in the budget screens).

  Click **view/print report**.

NOTE: When you view the Application for Federal Assistance report, ensure that it doesn't exceed the maximum page limit.

The other view/print report links are inoperable for the purposes of the SIF application (Funding Summary Chart, Organization IDRC History, Organization/People Report, Program Summary Chart)

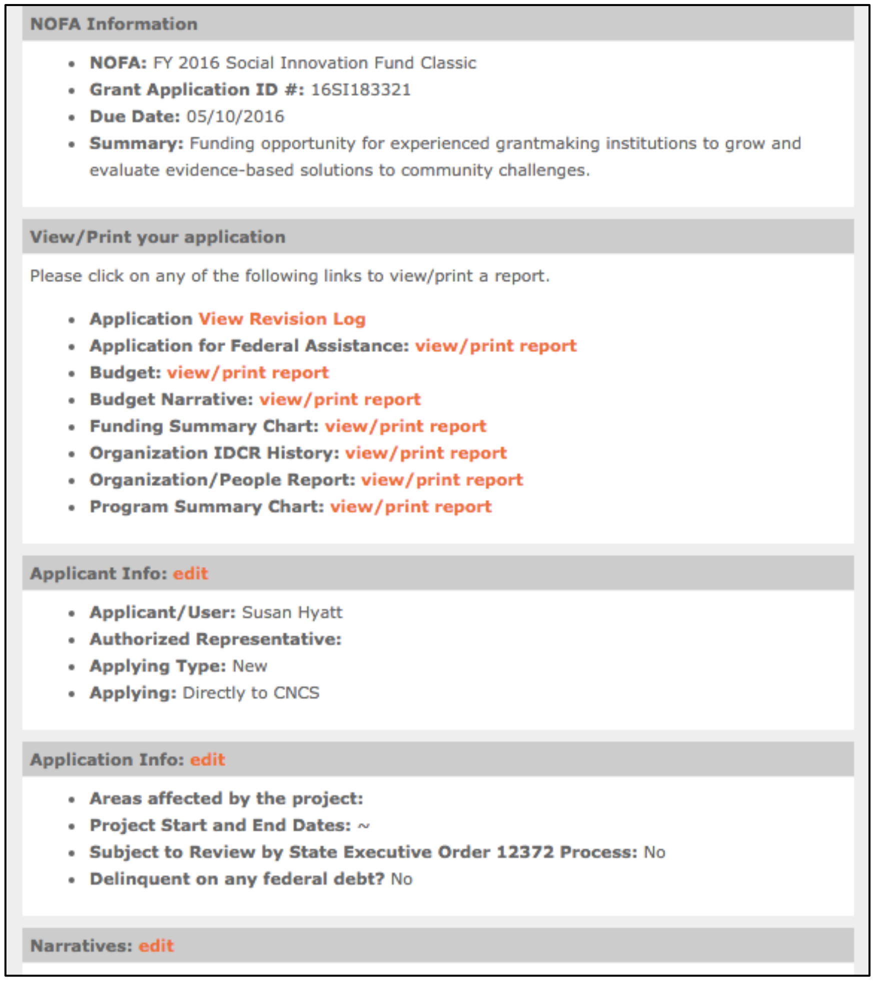

Figure 27: Application review screenshot

Authorize and Submit

Once you have made all the edits to your application, the authorized representative can authorize and submit. See the application instructions for a description of this role. The authorized representative must sign into his or her eGrants account in order to complete the following steps:

- Click **Agree**.

- You will see Authorized By (name) and Authorized On (date) when correctly authorized. The radio button will still be open, but as long as the 'Authorized By' information is there, the application has been authorized.
- Next move to Assurances and click on **view/print certification**. Read the Assurances, including the specific Assurances for the Social Innovation Fund found near the end.
- Next, move to Certifications and click **view/print certification**. Read the Certifications. Once you have thoroughly read the Certifications (and agree to them!), click **I Agree.** You will see Authorized Certifying Official: (name) and Certified on (date) when the Assurances are correctly certified. Now click **Verify this Grant Application.**
- If there are any errors in your application, you will receive an error message. Go back to each section, correct any issues, and click **Verify this Grant Application** again.
- If you have corrected all the errors, you will receive a message stating: *"No application errors were found! The application was verified with no errors."*
- The last step is to click **Submit grant application to CNCS**. Once submitted, you will receive a thank you message (Figure 28).

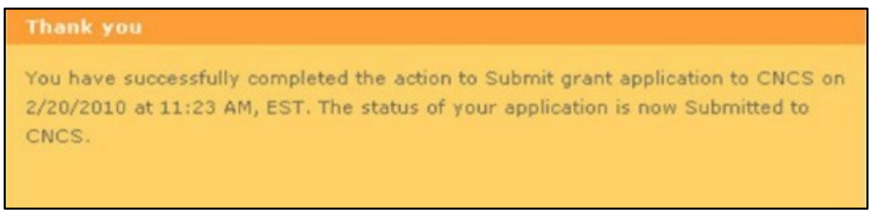

Figure 28: Thank you screenshot

Assistance With Your Application

For technical questions and problems with the eGrants system, call the National Service Hotline at (800) 942-2677.

Hours of Operations During Application Period:

Monday through Friday, 9:00 a.m. to 7:00 p.m. Eastern Time

Note: The hotline is closed on federal holidays.

Potential applicants can also enter questions for the eGrants support team online (https://questions.nationalservice.gov/app/ask). Be prepared to provide the application ID, organization's name, and the name of the Notice to which the organization is applying.

The *Application and Submission Information* section of the Notice explains what to do if you experience technical difficulties in eGrants.