



eCivis

**GRANTS NETWORK
EXTERNAL USER GUIDE**

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PORTAL USER GUIDE
Pre-Award Grants Management
for Applicants

1. Logging into Your eCivis Portal Account

If you are applying to a program solicitation, you will need to have a Portal account at <https://portal.ecivis.com/#/login>.

NOTE: If you have an account for eCivis *Grants Network*, you can enter your eCivis username (typically your email) and password. Then, click on the eCivis Login button

If you are new to eCivis *Portal*, This free account is where you will create a user profile, manage all of your application submissions and if awarded, manage all of you post-award reporting:

The screenshot shows the 'Welcome to the Portal' login page. On the left, there is a green circular logo and text: 'This service provided by eCivis makes it possible for interested parties to save, collaborate, and apply for solicitations. Login, or create a free account to start.' The main form area contains a 'Login' field, a 'Password' field with a note '(Minimum 8 chars, alphanumeric with symbol(s))', two buttons: 'Portal Login' (marked with a red '1') and 'eCivis Login' (marked with a red '2'), a 'Forgot Password?' link (marked with a red '3'), and a 'Create an account' button (marked with a red '4'). At the bottom, there is a link for 'eCivis Grants Network user?' with the instruction 'Use your existing login above and the eCivis Login button.'

1. **Portal Login:** for users who have a Portal account only.
2. **eCivis Login:** for users who have a Grants Network account. It will be the same username and password.
3. **Forgot Password?:** Reset your password by entering your email on the following window.
4. **Create an account:** for new users without a Portal account.



eCivis

PORTAL USER GUIDE
Pre-Award Grants Management
for Subrecipients

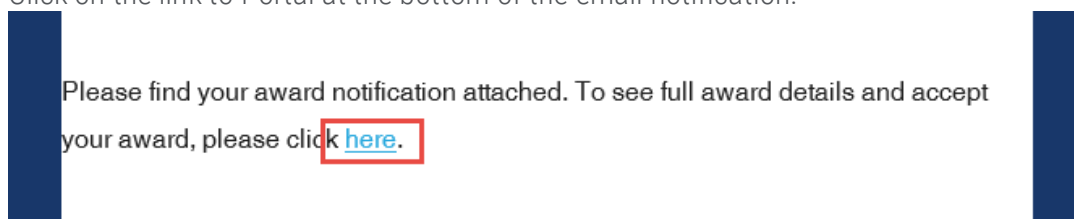
1. Accepting an Award

As an applicant, if my application is approved I will need to know how to accept an award and begin managing reporting requirements.

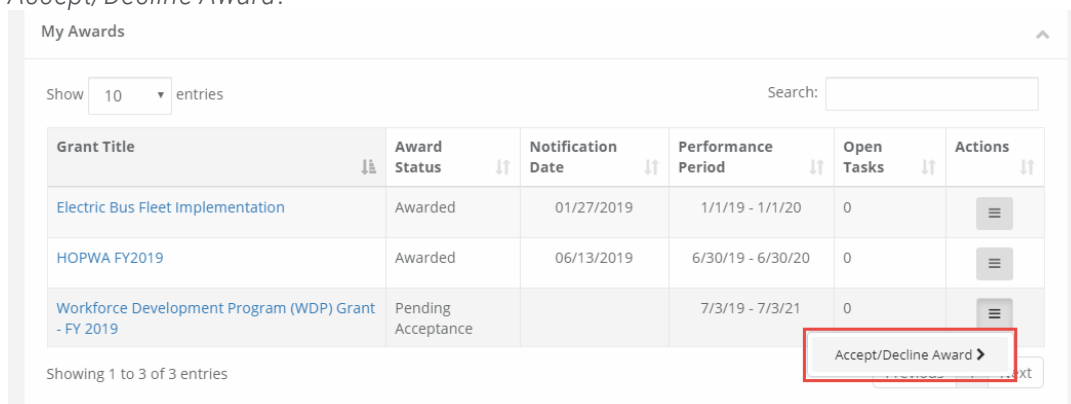
If you have been selected to receive an award, you will be notified by email. The email will also have a PDF version of the award notification for your records:



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



- 2) Log into Portal and click on the appropriate Award title, or from the Actions column, select *Accept/Decline Award*:



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

Award Files

Show entries Search:

File Name	File Size	Actions
No files are available for download		

Showing 0 to 0 of 0 entries Previous Next

Continue
Decline Award
Back

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

DOWNLOADED FILES
FINALIZE BUDGET
ATTACH FILES

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

Budget Settings				Budget Summary		
Multi-Term Budget:	<input checked="" type="radio"/> No <input type="radio"/> Yes			\$1,050,000.00	Total Direct Costs	
Indirect Costs:	Not Applicable	0.00	%	\$0.00	Total Indirect Costs	
Match / Cost Share:	Not Applicable	0.00	% \$ 0.00	\$1,050,000.00	Total Amount (Direct + Indirect)	
Budget Stage:	Awarded				\$0.00	Match / Cost Share
Actions:	<input type="button" value="Download"/> <input type="button" value="Cancel"/> <input type="button" value="Save"/>				\$0.00	Program Income

Budget Items

1. Economic development

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

Activity 1 - Economic development

Activity 2 - Economic development

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

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

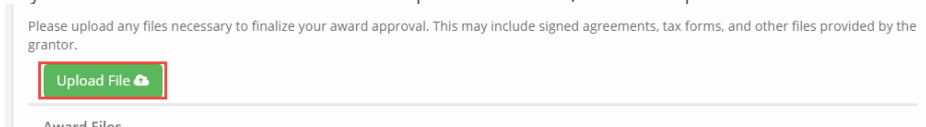
If you plan to decline your award offer, click "Decline Award."

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

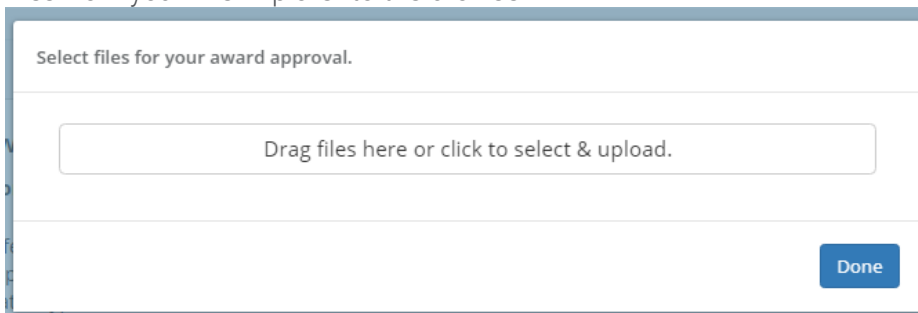
8000 characters remaining

[Accept and Continue](#)
[Request Budget Change](#)
[Decline Award](#)
[Back](#)

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



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



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

Show entries Search:

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

Showing 1 to 1 of 1 entries Previous 1 Next

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

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

Showing 1 to 1 of 1 entries Previous 1 Next

[Save](#)
[Finalize and Submit](#)
[Decline Award](#)
[Back](#)

2. Accessing your Awards

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

The screenshot shows the 'My Awards' page with a navigation bar on the left and a user profile on the right. The main content is a table of awards with the following data:

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

Showing 1 to 7 of 7 entries

Previous 1 Next

Reload

- Grant Title:** Name of the program.
- Award Status:**
 - **Awarded:** You have accepted the award.
 - **Pending Acceptance:** The award is waiting for you to accept or decline it.
- Notification Date:** The date the program officer reviewed and approved your award.
- Performance Period:** The project period as specified by the Program Officer.
- Role:**
 - **Owner:** You submitted the application and are tracking and managing the award.
 - **Team Member:** You are not the original applicant but were invited to help track the award and submit reports.
- Actions:** Varies by award status:
 - **Awarded:** Manage Award
 - **Pending Acceptance:** Accept/Decline Award

3. Navigating your Award Management Tools

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

3.1. Award Detail Section

Award Dashboard

Award Detail [View Budget](#) [View Goals](#) [View Files](#) [Submit Financial Report](#) [Submit Activity Report](#) [Request Grant Amendment](#) [Manage Project Team](#)

Subrecipient: City of Industry **Program:** Economic Recovery Program
Project: Recover Our Community
Approval Date: 04/06/2020
Approved amount: \$13,000.00 +
 Total Federal Award: \$3,000.00
 Total Non-Federal Award: \$10,000.00
Total Match: \$0.00
Performance period: 04/07/2020 - 04/15/2020

1. Click + to view Funding Details.
2. **View Budget:** View your budget.
3. **View Goals:** View your applicants goals
4. **View Files:** The grantor has attached the following files for you to download and view.
5. **Submit Financial Report:** Submit a new Financial Report.
6. **Submit Activity Report:** Submit a new Activity Report.
7. **Request Grant Amendment:** Request a grant amendment.
8. **Manage Project Team:** View team members who also have access to the Award Dashboard and can submit reports. Team members can be added and removed using this button. This button will only appear for Owners of the award.

3.2. Pending Tasks Section

Pending Tasks

Show 10 entries Search: 10/01

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

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

Previous 1 Next Reload

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

3.3. Financial Activities Section

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

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

1. **Financial Report:** Type of report

2. **Reporting Period:** Date range of items in the report.

3. **Created by:** Team member who submitted the report.

4. **Date Created:** Date on which the report was saved.

5. **Current Status:**

- **Approved/Awaiting Payment:** the funding agency has approved the report but has not submitted payment.

- **Approved//Paid:** the funding agency has approved the report and submitted the reimbursement.

- **Rejected:** The funding agency needs more information.

- **Pending Approval:** The report has been submitted, and there has been no action by the funding agency.

6. **Actions:**

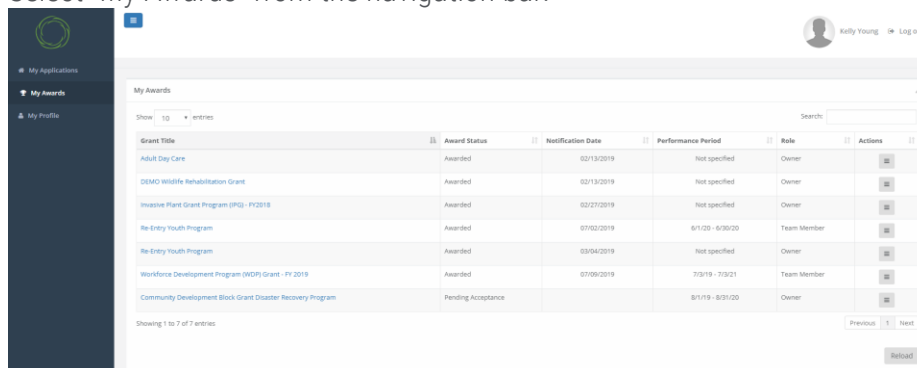
- **Review/Resubmit:** If a report has been rejected, the applicant will have the opportunity to edit the rejected report, and resubmit it.

4. Submitting Reports to your Grantor

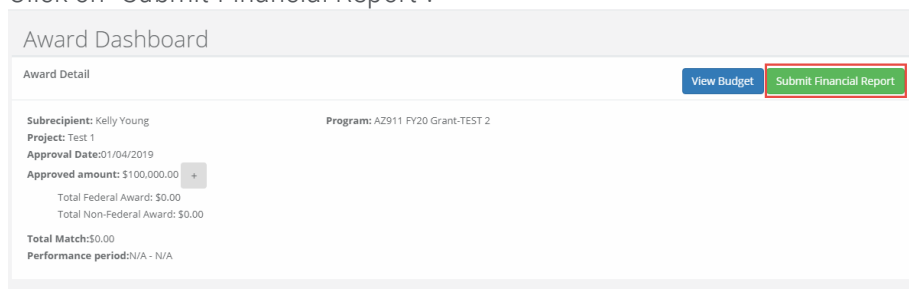
4.1 Submitting Financial Reports

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

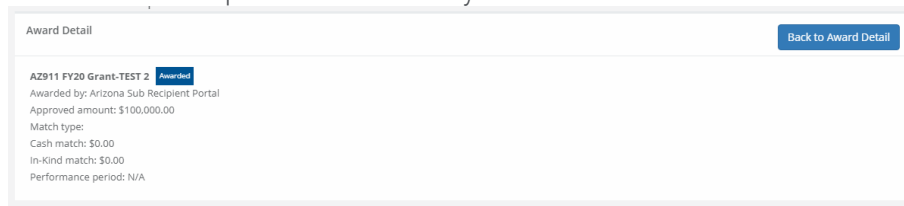
- 1) Select "My Awards" from the navigation bar:



- 2) Click on "Submit Financial Report":



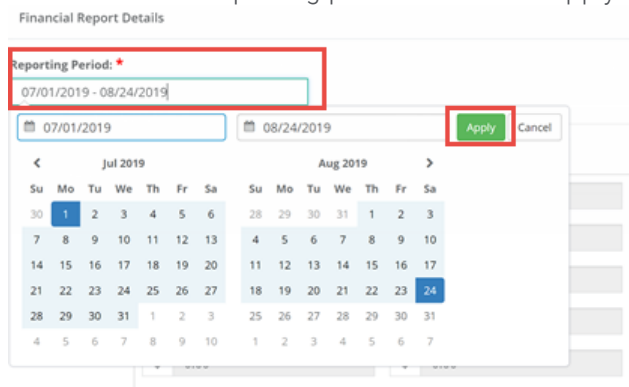
- 3) The Award Detail provides a summary of the award information:



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

	Spend		Match		Spend + Match	
Award Total Spend	\$ 0.00		\$ 0.00		\$ 0.00	
	0.00	%	0.00	%		
Award Remaining	\$ 100,000.00		\$ 0.00		\$ 100,000.00	

- In the Financial Report Details, click inside the Reporting Period text box and provide the dates of the reporting period then click "Apply":



- Enter the amounts in the appropriate category under the Spend and Match columns. Spend is the amount of grant funds spent.

Match is the amount of match funds spent. Applicants can only report in categories they are awarded in:

Financial Report Details

Reporting Period: *
07/01/2019 - 08/24/2019

Category	Spend	Match	Spend + Match	Award Remaining
1. Personnel	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
2. Fringe Benefits	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
3. Travel	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
4. Equipment	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
5. Supplies	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
6. Contractual	\$ 0.00	\$ 0.00	\$ 0.00	\$ 275,000.00
7. Construction	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
8. Other	\$ 0.00	\$ 0.00	\$ 0.00	\$ 10,000.00
Program Income	Received \$ 0.00	Expended \$ 0.00		
Report Total	Spend \$ 0.00 0.00 %	Match \$ 0.00 0.00 %	Spend + Match \$ 0.00	

NOTE: If a category is grayed out, and you would like to request reimbursement in that category, a budget modification is needed.

- The "Spend + Match" and "Award Remaining" columns will automatically calculate the costs when you update the Spend and Match amounts. Additionally, the Report Totals will automatically calculate to provide a breakdown of the amounts and percentages of funds used in the Reporting period:

Reporting Period: 07/01/2019 - 08/24/2019

Category	Spend	Match	Spend + Match	Award Remaining
1. Personnel	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
2. Fringe Benefits	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
3. Travel	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
4. Equipment	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
5. Supplies	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
6. Contractual	\$ 50,000.00	\$ 0.00	\$ 50,000.00	\$ 225,000.00
7. Construction	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
8. Other	\$ 5,000.00	\$ 0.00	\$ 5,000.00	\$ 5,000.00
Report Total	\$ 55,000.00	\$ 0.00	\$ 55,000.00	
	100.00 %	0.00 %		

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

Category	Spend	Match	Spend + Match	Award Remaining
1. Personnel	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
2. Fringe Benefits	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
3. Travel	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
4. Equipment	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
5. Supplies	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
6. Contractual	\$ 50,000.00	\$ 0.00	\$ 50,000.00	\$ 225,000.00
7. Construction	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
8. Other	\$ 5,000.00	\$ 0.00	\$ 5,000.00	\$ 5,000.00
Report Total	\$ 55,000.00	\$ 0.00	\$ 55,000.00	
	100.00 %	0.00 %		

Reimbursement Request*
 \$ 55,000.00

This is my final report

- 8) When this is the final report and the final request for reimbursement, check the “This is my final report” box. The grant closeout process will automatically begin once this box is checked and submitted.

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

Financial Report Narrative *

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

</> H1 H2 H3 B I U

- 9) You can also upload any documents, including PDFs and scanned images, to the Financial Report. Click on “Upload File” to attach a document:

Financial Report Files

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

[Upload File](#)

Show 10 entries Search:

File Name	File Size	Actions
No files are available for download		

Showing 0 to 0 of 0 entries [Previous](#) [Next](#)

10) When you are finished, click "Submit Report":

No files are available for download

Showing 0 to 0 of 0 entries [Previous](#) [Next](#)

[Submit Report](#) [Cancel](#)

11) Click on the warning page to send the report to the funding agency:

Warning!

Are you sure you want to submit your financial report? This will send the contents of this form to the grantor for approval.

[Cancel](#) [OK](#)

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

Financial Activities

Show 10 entries Search:

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

Showing 1 to 1 of 1 entries [Previous](#) 1 [Next](#)

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

Financial Activities

Show 10 entries Search:

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

Showing 1 to 3 of 3 entries [Previous](#) 1 [Next](#)

- Pending Approval: The Financial Report has not been reviewed.


- **Approved/Awaiting Payment:** The Financial Report has been reviewed and is waiting for payment.

- **Approved/Paid:** The reimbursement is complete.

- 14) If this report fulfills an assigned *Financial Report* task in your *Pending Tasks* table, click on the Actions icon next to that task and click “Mark Task Complete”:

Pending Tasks

Show 10 entries Search:


Task Type	Due Date	Actions
Financial Report Request	06/30/2020	
Financial Report Request	09/30/2020	<ul style="list-style-type: none"> Create Financial Report Mark Task Complete
Activity Report Request	09/30/2020	

4.2. Submitting Activity Reports

- 1) From “My Awards,” select the Grant Title of the award:

My Awards

Show 10 entries Search: WDP

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

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

Previous 1 Next

Reload

- 2) At the top right, click “Submit Activity Report”:

Award Dashboard


Award Detail

[View Budget](#) [Submit Financial Report](#) [Submit Activity Report](#) [Manage Project Te](#)

Subrecipient: Ulysses Grant **Program:** Workforce Development Program (WDP)
Grant - FY 2019

Project: Job Incubator **Award ID:** HXI-082019-001

Approval Date: 07/09/2019

Approved amount: \$40,000.00 

Total Federal Award: \$0.00
Total Non-Federal Award: \$40,000.00







- 3) Complete the following form and attach any pertinent files:

Activity Report

Reporting Period: *

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

Report Narrative: *

<> H1 H2 H3 B I U       %

- 4) Update any Goal/Activity Metrics

Activity Report Metrics


Please enter metrics to describe progress on your goals.

Businesses Trained and Implemented :	<input type="text" value="0.00"/>	(5.00)
Total Served Target:	<input type="text" value="0.00"/>	(1000.00)

- 5) Attach any Activity Report Files by clicking the green *Upload File* button

Activity Report Files

Please upload any files necessary for your activity report.

[Upload File](#) 

Show entries

File Name	File Size	Actions
No files are available for download		

- 6) Click "Submit Report":

Previous Next

Submit Report
Cancel

- 7) If this report fulfills an assigned Activity Report task in your *Pending Tasks* table, click on the Actions icon next to that task and click “Mark Task Complete”:

Task Type	Due Date	Actions
Activity Report Request	09/30/2020	
Activity Report Request	12/31/2020	<ul style="list-style-type: none"> Create Activity Report Mark Task Complete

Showing 1 to 2 of 2 entries

5. Submitting a Grant Amendment

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

My Awards

Show 10 entries

Grant Title	Award Sta
Community Development Block Grant	Awarded

Showing 1 to 1 of 1 entries

- 2) Click on “Request Grant Amendment”:

Award Dashboard

Award Detail

View Budget Submit Financial Report Submit Activity Report Request Grant Amendment

Subrecipient: Harvey Wilson
Project: Test Application
Approval Date: 08/29/2019
Approved amount: \$220,000.00
Total Federal Award: \$0.00
Total Non-Federal Award: \$220,000.00
Total Match: \$0.00

Program: Community Development Block Grant

- 3) Complete the basic award details and click “Save and Continue”:

Grant Amendment

AWARD DETAILS FINANCIAL INFORMATION ATTACH FILES

Please edit the appropriate information below.

Organization Name: Harvey Wilson

Project Name: Test Application

EIN: 48-4567892

Performance Period End: 11/12/2020

Save and Continue

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

AWARD DETAILS FINANCIAL INFORMATION ATTACH FILES

This amendment includes a financial change

Budget Settings				Budget Summary		
Multi-Term Budget	<input checked="" type="radio"/> No <input type="radio"/> Yes			\$45,000.00	Total Direct Costs	
Indirect Costs	Not Applicable	0.00	%	\$0.00	Total Indirect Costs	
Match / Cost Share	Not Applicable	0.00	% \$ 0.00	\$45,000.00	Total Amount (Direct + Indirect)	
Budget Stage:	Post-Award				\$0.00	Match / Cost Share
Actions					\$0.00	Program Income

Budget Items

1. Administrative and Legal Expenses

	Ext Cost	Direct Cost	Ind Cost	Cost Share
Administrative and Legal Expenses Totals:	\$27,500.00	\$45,000.00	\$0.00	\$0.00

Title	Description	Units	Unit Cost	Extended Cost	Cost	GL Code	Item Type
Legal Expenses	n/a	5.00	\$5,500.00	\$27,500.00	\$45,000.00		Direct Cost

[Add Row](#)

- 5) Upload any documentation needed to support the amendment by clicking the "Upload File" button, include additional notes/clarification in the narrative, and click "Submit Amendment":

AWARD DETAILS FINANCIAL INFORMATION ATTACH FILES

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

Upload File

Amendment Files

Show 10 entries Search:

File Name	File Size	Actions
No files have been uploaded		

Showing 0 to 0 of 0 entries Previous Next

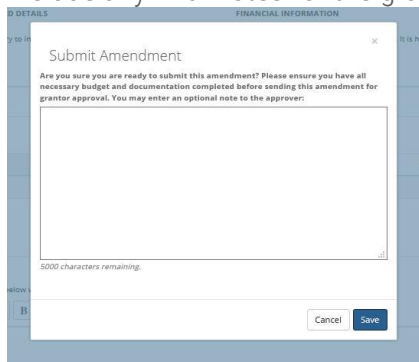
Amendment Narrative:
You can include a narrative below with any extra information about the amendment.

↶ H1 H2 H3 B I U ☰ ☷ ☱ ☲ ☳ ☴ ☵ ☶ ☷ ☸

8000 characters remaining

Back
Submit Amendment

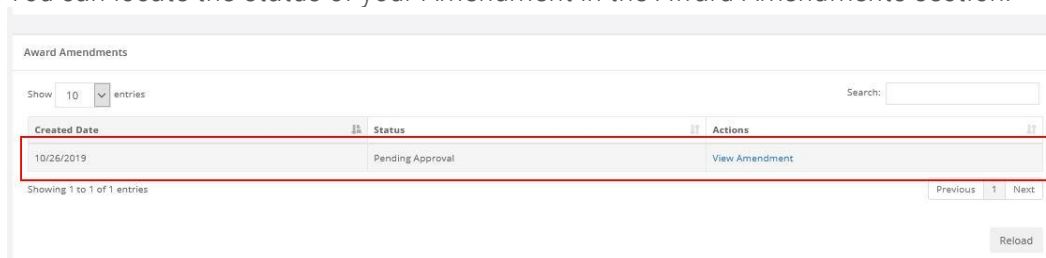
- 6) Include any final notes for the grantor to consider and click "Save":



- 7) You will be notified that your amendment was successfully submitted:



- 8) You can locate the status of your Amendment in the Award Amendments section:



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