

# Grantee WebGrants Claims Training

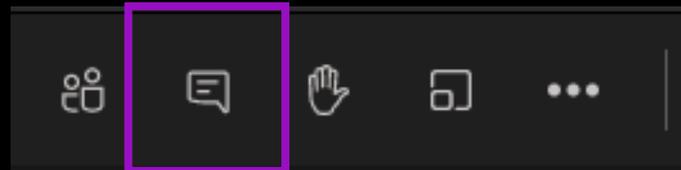
How to Submit Invoices in WebGrants

February 24, 2021

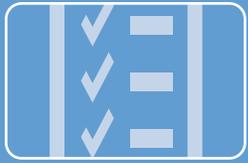
March 10, 2021

# Please fill out the Sign-In Sheet

The link to the Excel sheet is in the chat



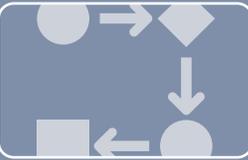
# Agenda



Sign-In Sheet



WebGrants & The Grantee's Role



Invoice/Claims Process



WebGrants Claims Walk-thru



Q & A

# WebGrants & The Grantee's Role

- WebGrants is CDFW's online application and grant tracking system
  - Grant tracking in WebGrants includes invoice/claims processing, document storage, expenditure tracking
- Grantees will be required to submit invoices through WebGrants for reimbursement starting April 1, 2021
  - Required for all new grant projects and projects active beyond April 30, 2021

# Invoices vs Claims



## Invoice

- Document that fulfills all requirements per the Agreement for grant reimbursement
- On the CDFW Invoice Template or an approved Grantee Template



## Claims

- The WebGrants process to submit the Invoice
- WebGrants data entry + Invoice

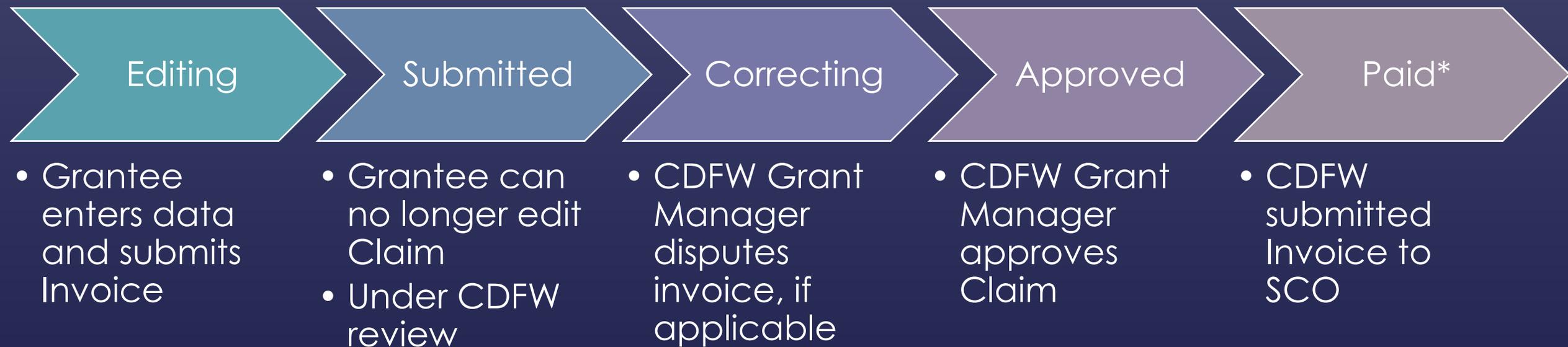
# How is the Process Different?

- Parts of process are now handled through WebGrants Claims
  - Grantee Invoice Submission
  - CDFW Grant Manager Review and Approval
  - Invoice dispute notification and resolution



- The Invoice you prepare and the supporting documents you submit will remain the same, as is done currently

# WebGrants Claims Process



\*Paid Status **does not** mean that a check has been cut. The payment is in process. Payments are made through the SCO Fi\$Cal system, which is separate from WebGrants

# Benefits of WebGrants Claims



- WebGrants Claims calculations make checking line item amounts simple
- Current Grant Information
  - Budget
  - Costs to Date
  - Remaining Balance
- Access to Claim Status
  - Know Claim Status at any time
  - Email notifications when Claim Status changes

# How to Find Your Grant

WebGrants Walk-Through

<https://watershedgrants.wildlife.ca.gov/>

## Log In

User ID:\*

Password:\*

[Forgot User Id?](#)

[Reset Password](#)



New to WebGrants - California Department of Fish and Wildlife?

[Register Here](#)

## Announcements

### Registration Instructions

#### Returning Applicants/Users

Do not register if you already have a user account. If you cannot remember your account information, use the "Forgot User Id?" link under the login fields.

#### First Time Users

When registering please do the following:

1. Include your organization information
2. Do not provide your home phone number or address under "Personal Information." Instead, please provide your direct business contact information

### WebGrants User Guide

See the [WebGrants User Guide](#) for additional help with some WebGrants Basics:

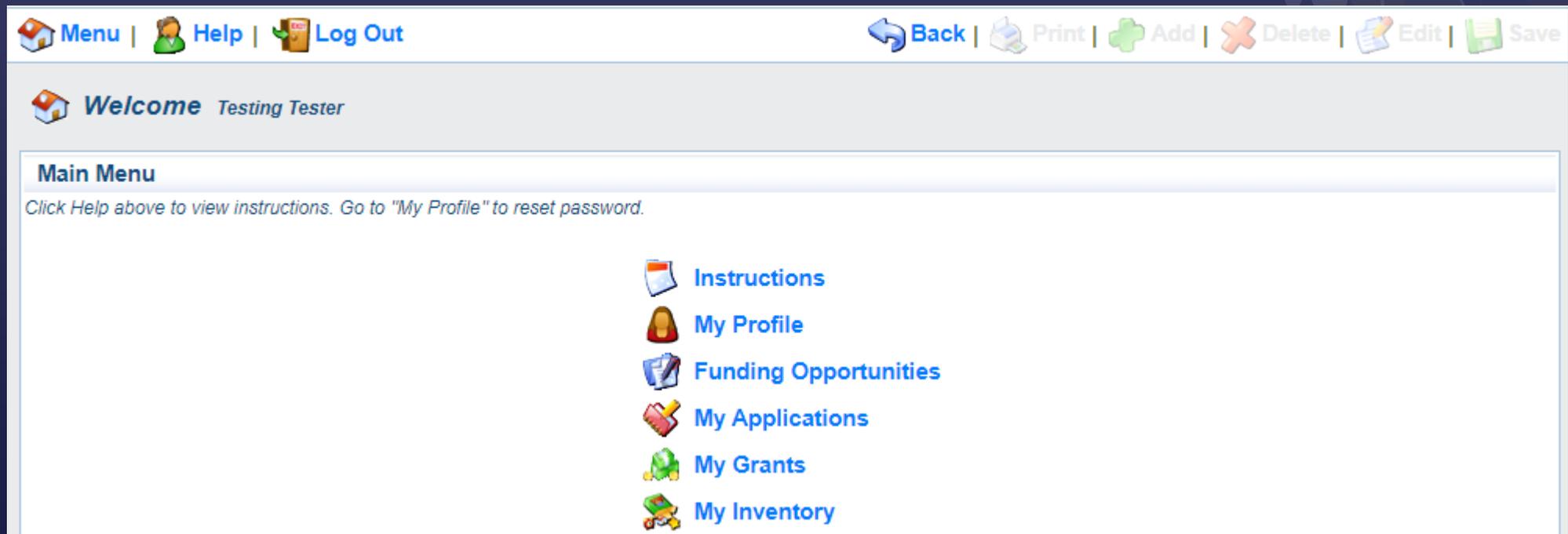
1. How to register (create a WebGrants account)
2. How to navigate WebGrants
3. How to start a new application
4. How to submit an application

# CDFW WebGrants Home Page

- Login to WebGrants
- If you do not have a WebGrants user account, please register
  - See the [WebGrants User Guide](#) for registration instructions

# WebGrants Main Menu

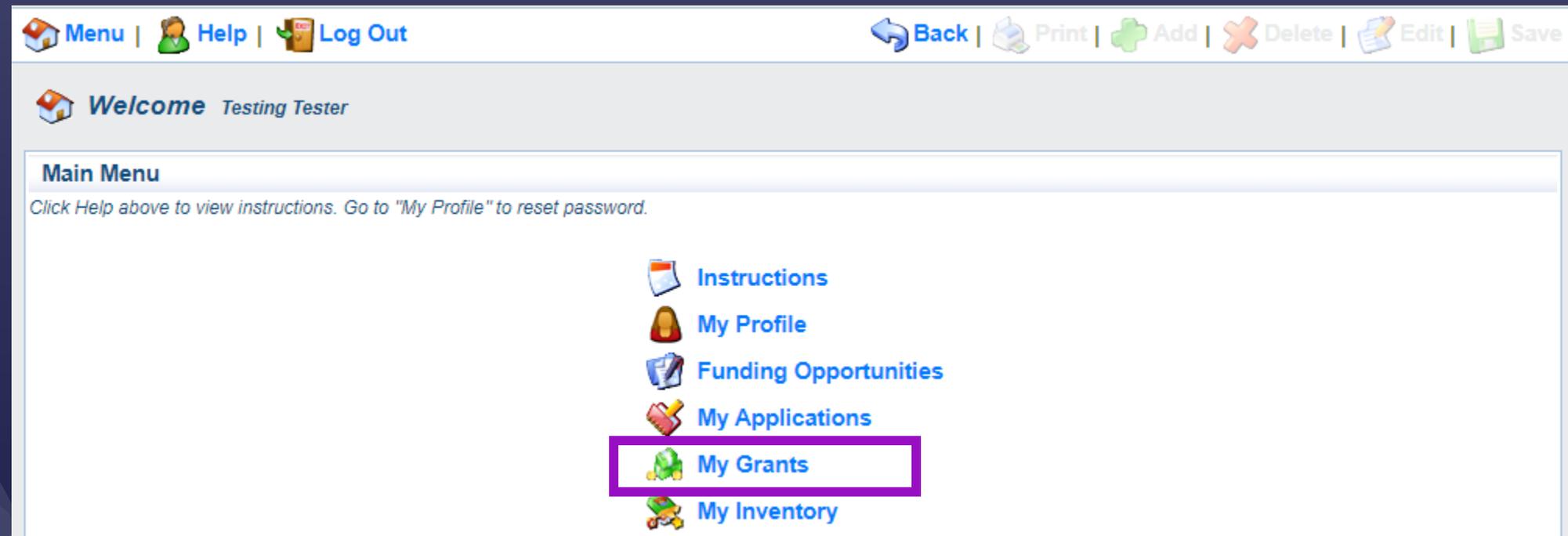
- **My Profile:** Update contact information or change your password
- **My Grants:** View a list of all your Underway Grants
  - Underway = The project has an executed grant agreement



The screenshot shows the WebGrants Main Menu interface. At the top, there is a navigation bar with icons and text for [Menu](#), [Help](#), and [Log Out](#). To the right of this bar are action icons for [Back](#), [Print](#), [Add](#), [Delete](#), [Edit](#), and [Save](#). Below the navigation bar, a welcome message reads "Welcome Testing Tester". The main content area is titled "Main Menu" and contains the instruction: "Click Help above to view instructions. Go to 'My Profile' to reset password." Below this instruction is a vertical list of menu items, each with an icon and a text label: "Instructions" (document icon), "My Profile" (person icon), "Funding Opportunities" (document with dollar sign icon), "My Applications" (document with checkmark icon), "My Grants" (green plant icon), and "My Inventory" (shopping cart icon).

# WebGrants Main Menu

1. Click "My Grants"



The screenshot shows the WebGrants Main Menu interface. At the top, there is a navigation bar with icons and text for [Menu](#), [Help](#), and [Log Out](#). To the right of this bar are action icons for [Back](#), [Print](#), [Add](#), [Delete](#), [Edit](#), and [Save](#). Below the navigation bar, a welcome message reads "Welcome Testing Tester". The main content area is titled "Main Menu" and contains the instruction: "Click Help above to view instructions. Go to 'My Profile' to reset password." A list of menu items is displayed, each with an icon and a text label: "Instructions" (document icon), "My Profile" (person icon), "Funding Opportunities" (document with checkmark icon), "My Applications" (hand holding pencil icon), "My Grants" (green box icon, highlighted with a purple border), and "My Inventory" (shopping cart icon).

# My Grants – Current Grants

2. Click on the “Project Title” of the grant you want to open

*If you cannot find your grant, please contact your CDFW Grant Manager. You may not be associated with it*

Current Grants							<a href="#">Search My Grants</a>   <a href="#">Closed Grants</a>   <a href="#">Claims</a>
ID	Status	Year	Project Title	Program Area	Grant Administrator	Awarded Amount	
02856	Underway	2019	<a href="#">HS Test application 2 - 2019-0222</a>	TEST PROGRAM AREA	Juan Calderon	\$323,720.20	
03025	Underway	2019	<a href="#">KEEP - Full application #3</a>	TEST PROGRAM AREA	Juan Calderon	\$104,999.00	
03622	Underway	2019	<a href="#">KEEP - EM - Testing Amendments</a>	TEST PROGRAM AREA	Juan Calderon	\$300,006.00	
Q000TEST	Underway	2019	<a href="#">Grantee Training TEST GRANT</a>	TEST PROGRAM AREA	Erin Aquino-Carhart	\$1,000,000.00	
P999876	Underway	2018	<a href="#">2019 WebGrants Training - FRGP Test Grant 1 M to Z</a>	FRGP - Fisheries Restoration Grant Program	Timothy Chorey	\$131,157.50	
P999554	Underway	2018	<a href="#">2019 WebGrants Training - FRGP Test Grant 1 A to L</a>	FRGP - Fisheries Restoration Grant Program	Timothy Chorey	\$8,273,853,491.51	
00300	Underway	2018	<a href="#">FRGP 2018/19 Funding Opportunity Review</a>	FRGP - Fisheries Restoration Grant Program	Timothy Chorey	\$24,480.00	
TEST1234	Underway		<a href="#">TEST GRANT 1234</a>	TEST PROGRAM AREA	Erin Aquino-Carhart	\$0.00	
1724057 - KEEP	Underway		<a href="#">Budget Switcheroo - KEEP</a>	TEST PROGRAM AREA	Erin Aquino-Carhart	\$11,055,826.00	
					<b>Total</b>	<b>\$8,286,793,680.21</b>	

# Grant Main Page

- The Grant Main Page is the record of your grant from Application to Close
- The Grant Components list the forms associated with your grant
  - The forms vary between grant programs

Grant Components	
Component	Last Edited
General Information	02/02/2021
Project Summary	02/02/2021
Agreement & Amendments	
Schedule & Deliverables	
<hr/>	
Claims	
Budget	02/02/2021
Cost Share	02/02/2021
Performance Measures	
Conservation Targets	
<hr/>	
Opportunity	-
Application	-

# WebGrants Claims

WebGrants Walk-Through

# Grant Main Page

- Click “Claims” to open the Claims Main Page

Grant Components	
Component	Last Edited
General Information	02/02/2021
Project Summary	02/02/2021
Agreement & Amendments	
Schedule & Deliverables	
Claims	
Budget	02/02/2021
Cost Share	02/02/2021
Performance Measures	
Conservation Targets	
Opportunity	-
Application	-

# Claims Main Page

- All your grant's Claims are shown on the Claims Main Page
- Claims cannot be deleted, so please follow the guidance to minimize mistakes and keep a clean record
- Descriptions for the table columns is in the [Guidance Doc](#)

Claims		<a href="#">Copy Existing Claim</a>   <a href="#">Return to Components</a>				
ID	Type	Status	Date Submitted	Date Paid	Date From-To	Claim Amount
<a href="#">P999876 - 001</a>	Reimbursement	Approved	10/22/2020		04/25/2018 - 05/25/2018	\$10.00
<a href="#">P999876 - 002</a>	Reimbursement	Editing			04/18/2018 - 04/25/2018	\$0.00
<a href="#">P999876 - 003</a>	Reimbursement	Paid	02/06/2020	10/19/2020	01/01/2020 - 01/31/2020	\$14,670.00
<a href="#">P999876 - 004</a>	Reimbursement	Paid	07/18/2019	10/22/2020	05/01/2018 - 07/15/2019	\$4,375.00
<a href="#">P999876 - 005</a>	Reimbursement	Paid	10/19/2020	10/20/2020	10/05/2020 - 10/19/2020	\$2,000.00
<a href="#">P999876 - 006</a>	Reimbursement	Editing			06/01/2018 - 03/31/2020	\$0.00
<a href="#">P999876 - 007</a>	Reimbursement	Editing			10/21/2020 - 10/21/2020	\$10.00
					Submitted Amount	\$0.00
					Approved Amount	\$10.00
					Paid Total	\$21,045.00
					Total	\$21,065.00

# Create a New Claim

1. Click "Add" to create a new Claim

Menu | Help | Log Out | Back | Print | **Add** | Delete | Edit | Save

 **Grant Tracking**

**Grant: Q000TEST - Grantee Training TEST GRANT - 2019**

**Status:** Underway

**Program Area:** TEST PROGRAM AREA

**Grantee Organization:** BaseLine Organization

**Program Officer:** Erin Aquino-Carhart

**Awarded Amount:** \$1,000,000.00

**Claims** [Return to Components](#)

ID	Type	Status	Date Submitted	Date Paid	Date From-To	Claim Amount
					Submitted Amount	\$0.00
					Approved Amount	\$0.00
					Paid Total	\$0.00
					Total	\$0.00

# Create a New Claim

2. Leave the Claim Type as is
3. Enter the Report Period (billing period) from the Invoice
4. Click “Save”

 Menu |  Help |  Log Out

 Back |  Print |  Add |  Delete |  Edit |  Save

 **Grant Tracking**

## Claim General Information

*To create a new Claim enter the starting date and the ending date of the Report Period. This is the period of coverage for this Claim.*

**Claim Type:**\*

**Report Period**  

From Date



To Date

# Create a New Claim

5. Click “Return to Components” to open the Claim Components

## Reporting Period

**Claim Type:**\* Reimbursement

**Claim Status:**\* Editing

**Report Period** 10/01/2020  
From Date

12/31/2020  
To Date

[Return to Components](#)

Last Edited By: Testing Tester, 02/04/2021

# Claim Components

- Claim Components are the individual forms that make a Claim
- Each component must be marked as complete before submitting the Claim
- Click the name of each component to open them

Components			<a href="#">Preview</a>   <a href="#">Submit</a>
<i>Complete each component of the Claim and mark it as complete. Click Submit when you are done.</i>			
Name	Complete?	Last Edited	
<a href="#">General Information</a>	✓	02/04/2021	
<a href="#">Reimbursement</a>			
<a href="#">Description of Services Performed</a>			
<a href="#">Claim Supporting Documentation</a>			

# Reimbursement

1. Enter the expenses from the Invoice in the “Expenses This Period”
2. Click “Save”

Reimbursement			
Budget Category	Contract Budget	Expenses This Period	Prior Expenses (Paid)
<b>Personnel Services</b>			
1. Project Manager	\$55,000.00	<input type="text" value="\$0.00"/>	\$0.00
2. Accountant	\$5,000.00	<input type="text" value="\$0.00"/>	\$0.00
<b>Staff Benefits</b>			
	\$15,000.00	<input type="text" value="\$0.00"/>	\$0.00
<b>General Operating Expenses</b>			
1. Field Equipment	\$1,000.00	<input type="text" value="\$0.00"/>	\$0.00
2. Travel	\$500.00	<input type="text" value="\$0.00"/>	\$0.00
<b>Subcontractors</b>			
1. Construction Subcontractor	\$500,000.00	<input type="text" value="\$0.00"/>	\$0.00
2. Engineering Subcontractor	\$350,000.00	<input type="text" value="\$0.00"/>	\$0.00
3. Monitoring Subcontractor	\$58,200.00	<input type="text" value="\$0.00"/>	\$0.00
<b>Indirect Costs</b>			
	\$15,300.00	<input type="text" value="\$0.00"/>	\$0.00

# Reimbursement

- If you see a Totals field, please leave it blank or zeroed

Reimbursement			
Budget Category	Contract Budget	Expenses This Period	Prior Expenses (Paid)
<b>Personnel Services</b>			
1. Project Manager	\$55,000.00	<input type="text" value="\$0.00"/>	\$0.00
2. Accountant	\$5,000.00	<input type="text" value="\$0.00"/>	\$0.00
<b>Staff Benefits</b>			
	\$15,000.00	<input type="text" value="\$0.00"/>	\$0.00
<b>General Operating Expenses</b>			
1. Field Equipment	\$1,000.00	<input type="text" value="\$0.00"/>	\$0.00
2. Travel	\$500.00	<input type="text" value="\$0.00"/>	\$0.00
<b>Subcontractors</b>			
1. Construction Subcontractor	\$500,000.00	<input type="text" value="\$0.00"/>	\$0.00
2. Engineering Subcontractor	\$350,000.00	<input type="text" value="\$0.00"/>	\$0.00
3. Monitoring Subcontractor	\$58,200.00	<input type="text" value="\$0.00"/>	\$0.00
<b>Indirect Costs</b>			
	\$15,300.00	<input type="text" value="\$0.00"/>	\$0.00
<b>Totals</b>			
	\$0.00	<input type="text" value="\$0.00"/>	\$0.00

# Reimbursement

3. Check figures against the Invoice and your records
4. If more edits are necessary, click “Edit”
5. “Save” and “Mark as Complete” when done

Reimbursement		<a href="#">Mark as Complete</a>   <a href="#">Go to Claim Forms</a>			
Budget Category	Contract Budget	Expenses This Period	Prior Expenses (Paid)	Total Paid	Available Balance (Unpaid)
<b>Personnel Services</b>					
1. Project Manager	\$55,000.00	\$1,300.50	\$0.00	\$1,300.50	\$53,699.50
2. Accountant	\$5,000.00	\$189.63	\$0.00	\$189.63	\$4,810.37
<b>Staff Benefits</b>					
	\$15,000.00	\$372.53	\$0.00	\$372.53	\$14,627.47
<b>General Operating Expenses</b>					
1. Field Equipment	\$1,000.00	\$600.00	\$0.00	\$600.00	\$400.00
2. Travel	\$500.00	\$25.00	\$0.00	\$25.00	\$475.00
<b>Subcontractors</b>					
1. Construction Subcontractor	\$500,000.00	\$0.00	\$0.00	\$0.00	\$500,000.00
2. Engineering Subcontractor	\$350,000.00	\$200,000.00	\$0.00	\$200,000.00	\$150,000.00
3. Monitoring Subcontractor	\$58,200.00	\$0.00	\$0.00	\$0.00	\$58,200.00
<b>Indirect Costs</b>					
	\$15,300.00	\$497.53	\$0.00	\$497.53	\$14,802.47
<b>Totals</b>					
	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Sub Total:</b>	<b>\$1,000,000.00</b>	<b>\$202,985.19</b>	<b>\$0.00</b>	<b>\$202,985.19</b>	<b>\$797,014.81</b>
<b>Total:</b>	<b>\$1,000,000.00</b>	<b>\$202,985.19</b>	<b>\$0.00</b>	<b>\$202,985.19</b>	<b>\$797,014.81</b>

# Marking As Complete

- After you mark each component as “Complete,” you will return to the Claim Components and see a checkmark in the “Complete?” column

Components		<a href="#">Preview</a>   <a href="#">Submit</a>
<i>Complete each component of the Claim and mark it as complete. Click Submit when you are done.</i>		
Name	Complete?	Last Edited
<a href="#">General Information</a>	✓	02/04/2021
<a href="#">Reimbursement</a>	✓	02/04/2021
<a href="#">Description of Services Performed</a>		
<a href="#">Claim Supporting Documentation</a>		

# Description of Services Provided

1. Copy and paste the Description of Services Performed from the Invoice into the text box
2. "Save" and "Mark as Complete"

## Description of Services Performed

**Narrative Description:\***

- Post and bid for Construction Subcontractor
- Baseline monitoring
- Stakeholder meeting held in 10/15/2020
- Purchased field equipment
- Prepared first Quarterly Report and Invoice

This field is limited to 10,000 characters.

# Claim Supporting Documentation

You can only upload one file at a time. These instructions must be repeated for each file.

1. Click “Add”

 Menu |  Help |  Log Out

 Back |  Print |  Add |  Delete |  Edit |  Save

The following form will open:

### Attach File

Please upload any claim supporting documentation here

For assistance, email customer support at [CDFWebGrants@wildlife.ca.gov](mailto:CDFWebGrants@wildlife.ca.gov)

Upload File:  No file chosen

Description:\*

# Claim Supporting Documentation

2. Click “Choose File” and select the Invoice or supporting documents to upload
  - a. Please include your Agreement Number in your file names
3. Enter a short description of the file to help identify what it is in the “Description” text box
4. “Save”

### Attach File

Please upload any claim supporting documentation here

For assistance, email customer support at [CDFWebGrants@wildlife.ca.gov](mailto:CDFWebGrants@wildlife.ca.gov)

**Upload File:**  Q000TEST\_...oice01.docx

**Description:\***

# Claim Supporting Documentation

5. Repeat steps until all Claim Supporting Documents are uploaded
6. If you need to edit any of these entries, click the Description and edit as necessary

## Claim Supporting Documentation

[Mark as Complete](#) | [Go to Claim Forms](#)

*Please upload any claim supporting documentation here*

*For assistance, email customer support at [CDFWebGrants@wildlife.ca.gov](mailto:CDFWebGrants@wildlife.ca.gov)*

Description	File Name	File Size	Date Uploaded
<a href="#">Q000TEST Invoice 01 for work performed 10/01/2020-12/31/2020</a>	Q000TEST_Invoice01.docx	15 KB	02/05/2021

Last Edited By: Testing Tester, 02/05/2021

# Claim Supporting Documentation

7. To replace a file, you must delete it and add a new file
8. When all supporting documents are uploaded, “Mark as Complete”

 Menu |  Help |  Log Out

 Back |  Print |  Add |  Delete |  Edit |  Save

 **Application**

**Attach File**

Upload File: Q000TEST\_Invoice01.docx

Description:\*

# Review Claim

1. Click “Preview” to read the entire Claim in one page
2. Review the Claim and check if any information is missing
3. If edits are necessary, click the WG “Back” button and make edits in the appropriate component

Components			<a href="#">Preview</a>	<a href="#">Submit</a>
<i>Complete each component of the Claim and mark it as complete. Click Submit when you are done.</i>				
Name	Complete?	Last Edited		
General Information	✓	02/04/2021		
Reimbursement	✓	02/04/2021		
Description of Services Performed	✓	02/05/2021		
Claim Supporting Documentation	✓	02/05/2021		

# Submit Claim

1. Click “Submit”
2. You will see a popup warning that you will not be able to edit the Claim after it is submitted
3. If you are sure the Claim is complete, click “OK”

Components	Preview	Submit
<i>Complete each component of the Claim and mark it as complete. Click Submit when you are done.</i>		
Name	Complete?	Last Edited
General Information	✓	02/04/2021
Reimbursement	✓	02/04/2021
Description of Services Performed	✓	02/05/2021
Claim Supporting Documentation	✓	02/05/2021

# Submit Claim

You will receive confirmation that your Claim was submitted

## Claim Submitted Confirmation

You have successfully submitted your Claim numbered [001]. We have received your Claim for review.  
Click [here](#) to print claim.

- You may print your Claim by clicking “here”
- Your Claim will open in a new tab, where you can save it as a PDF or print it for your records

# Claim Negotiations

Invoice Dispute Resolution through  
WebGrants

# Invoice Dispute Process

- The Invoice Dispute Process has not changed
- Claim negotiations are how you will be notified of and resolve invoice disputes



# Claim Negotiation

- You will be notified of a Claim Negotiation via email
  - Claim #
  - Negotiation deadline
  - What needs to be addressed
  - Invoice Dispute Notification (attachment)
- The negotiated Claim Components will be unlocked and editable until the deadline
  - Once the corrections are made and the Claim is resubmitted, the Claim Process can continue

# Grantee WG Claims Guidance



Use the [Grantee WG Claims Guidance Doc](#) to help you through the Claims Process



Contact your CDFW Grant Manager if you need help with your Claim/Invoice



Contact the [WebGrants Help Desk](#) for technical assistance

# Questions?

- Submit your question in the chat or
- Raise your hand to ask your question