

# CDFW WebGrants Claims

## Grantee Guidance

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# CDFW WebGrants Claims

## Grantee Guidance

### Purpose

This guidance document covers how to enter and submit invoices within WebGrants (WG) Claims and is intended for Grantees.

### Materials Needed

1. **Invoice** – See your grant agreement for the information required for invoices. If you need an invoice template, please contact your Grant Manager.
2. **Supporting Documentation** – Receipts, subcontractor invoices, and other documents to support the expenses in your invoice for the billing period

### Start Here

1. Login to [WebGrants](#)
2. Click on "My Grants"

### My Grants

The My Grants page is where Grantees can see their list of grant projects.. If you cannot see your grants, please contact your Grant Manager.

### Current Grants

My Grants shows you your current grants by default. Current grants are any grants that have an executed grant agreement and are still active.

 **Grant Tracking**

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	
03025	Underway	2019	KEEP - Full application #3	TEST PROGRAM AREA	Juan Calderon	\$104,999.00	
03622	Underway	2019	KEEP- EM - Testing Amendments	TEST PROGRAM AREA	Juan Calderon	\$300,006.00	
Q000TEST	Underway	2019	Grantee Training TEST GRANT	TEST PROGRAM AREA	Erin Aquino-Carhart	\$1,000,000.00	
P999876	Underway	2018	2019 WebGrants Training - FRGP Test Grant 1 M to Z	FRGP - Fisheries Restoration Grant Program	Timothy Chorey	\$131,157.50	
P999554	Underway	2018	2019 WebGrants Training - FRGP Test Grant 1 A to L	FRGP - Fisheries Restoration Grant Program	Timothy Chorey	\$8,273,853,491.51	
00300	Underway	2018	FRGP 2018/19 Funding Opportunity Review	FRGP - Fisheries Restoration Grant Program	Timothy Chorey	\$24,480.00	
TEST1234	Underway		TEST GRANT 1234	TEST PROGRAM AREA	Erin Aquino-Carhart	\$0.00	
1724057 - KEEP	Underway		Budget Switcheroo - KEEP	TEST PROGRAM AREA	Erin Aquino-Carhart	\$11,055,826.00	
<b>Total</b>					<b>\$8,286,469,960.01</b>		

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The following is a description of the columns shown in the table.

1. **ID:** Grant agreement number
2. **Status:** WebGrants status. You will only see "Underway" grants in Current Grants
3. **Year:** Proposal Solicitation Notice (PSN) Year
4. **Project Title:** Grant project title
5. **Program Area:** Grant program
6. **Grant Administrator:** California Department of Fish and Wildlife (CDFW) Grant Manager
7. **Awarded Amount:** The grant awarded amount per the agreement

Open your grant by clicking on its Project Title.

# CDFW WebGrants Claims

## Grantee Guidance

 **Grant Tracking**

**Current Grants** [Search My Grants](#) | [Closed Grants](#) | [Claims](#)

*Grants in the status Underway or Suspended appear on this list. To view other Grants, click the closed Grants link.*

ID	Status	Year	Project Title	Program Area	Grant Administrator	Awarded Amount
03025	Underway	2019	KEEP - Full application #3	TEST PROGRAM AREA	Juan Calderon	\$104,999.00
03622	Underway	2019	KEEP_EM - Testing Amendments	TEST PROGRAM AREA	Juan Calderon	\$300,006.00
Q000TEST	Underway	2019	Grantee Training TEST GRANT	TEST PROGRAM AREA	Erin Aquino-Carhart	\$1,000,000.00
P999876	Underway	2018	2019 WebGrants Training - FRGP Test Grant 1 M to Z	FRGP - Fisheries Restoration Grant Program	Timothy Chorey	\$131,157.50
P999554	Underway	2018	2019 WebGrants Training - FRGP Test Grant 1 A to L	FRGP - Fisheries Restoration Grant Program	Timothy Chorey	\$8,273,853,491.51
00300	Underway	2018	FRGP 2018/19 Funding Opportunity Review	FRGP - Fisheries Restoration Grant Program	Timothy Chorey	\$24,480.00
TEST1234	Underway		TEST GRANT 1234	TEST PROGRAM AREA	Erin Aquino-Carhart	\$0.00
1724057 - KEEP	Underway		Budget Switcheroo - KEEP	TEST PROGRAM AREA	Erin Aquino-Carhart	\$11,055,826.00
<b>Total</b>					<b>\$8,286,469,960.01</b>	

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## Grant Components

The main page within each grant ("Grant Main Page") shows you the Grant Components, which are the Grant Tracking forms associated with that grant. Each grant program may have different Grant Components, but they will all use the same Claims form.

<b>Grant: Q000TEST - Grantee Training TEST GRANT - 2019</b>	
<b>Status:</b> Underway <b>Program Area:</b> TEST PROGRAM AREA <b>Grantee Organization:</b> BaseLine Organization <b>Program Officer:</b> Erin Aquino-Carhart <b>Awarded Amount:</b> \$1,000,000.00	
<b>Instructions</b>	
<i>The Grant forms appear below.</i>	
<b>Grant Components</b>	
Component	Last Edited
General Information	02/02/2021
Project Summary	02/02/2021
Agreement & Amendments	
Schedule & Deliverables	
<b>Claims</b>	
Budget	02/02/2021
Cost Share	02/02/2021
Performance Measures	
Conservation Targets	
Opportunity Application	-

## Claims

The Claims process is how WG tracks grant expenses and remaining balances. Each Claim is populated with information from the Grantee's Invoice. This guidance will focus on the steps of the Claims process that you, the Grantee, is involved in.

# CDFW WebGrants Claims

## Grantee Guidance

### The WG Claims Process

The following is the WG Claims process by Claims Status. See the [Glossary](#) for definitions of each status.



### The WG Claims Process with Negotiation

This graphic includes the Correcting Claims Status, which only occurs when a Claim is negotiated because the Invoice is disputed.



### Claims Main Page

When you click on Claims from the Grant Main Page, it opens the Claims Main Page.

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
P999876 - 001	Reimbursement	Approved	10/22/2020		04/25/2018 - 05/25/2018	\$10.00
P999876 - 002	Reimbursement	Editing			04/18/2018 - 04/25/2018	\$0.00
P999876 - 003	Reimbursement	Paid	02/06/2020	10/19/2020	01/01/2020 - 01/31/2020	\$14,670.00
P999876 - 004	Reimbursement	Paid	07/18/2019	10/22/2020	05/01/2018 - 07/15/2019	\$4,375.00
P999876 - 005	Reimbursement	Paid	10/19/2020	10/20/2020	10/05/2020 - 10/19/2020	\$2,000.00
P999876 - 006	Reimbursement	Editing			06/01/2018 - 03/31/2020	\$0.00
P999876 - 007	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

The following is a description of the columns shown in the table.

1. **ID:** The Claim Number. This is automatically generated when a new Claim is created. It is always the Grant Number followed by a serial number.
2. **Type:** The Claim Type, which is always "Reimbursement" because WRGB grant programs only pay in arrears.
3. **Status:** The Claim Status. This shows which part of the process the Claim is in.
4. **Date Submitted:** The date that the Claim was submitted in WG
5. **Date Paid:** The date that CDFW entered the Claim into Fi\$Cal for payment. For the actual paid date, please contact your CDFW Grant Coordinator.
6. **Date From-To:** The Claim billing period
7. **Claim Amount:** The total Claim amount

# CDFW WebGrants Claims

## Grantee Guidance

### Editing Status

The Claim [Editing Status](#) is when the Claim is created and submitted.

### Create a New Claim

1. Under Grant Components, click "Claims" to open the Claims Main Page

The screenshot shows the top navigation bar with links for Menu, Help, Log Out, Back, Print, Add (highlighted with a red box), Delete, Edit, and Save. Below the navigation is a "Grant Tracking" section for "Grant: Q000TEST - Grantee Training TEST GRANT - 2019". The grant details are as follows:

- Status: Underway
- Program Area: TEST PROGRAM AREA
- Grantee Organization: BaseLine Organization
- Program Officer: Erin Aquino-Carhart
- Awarded Amount: \$1,000,000.00

Below the grant details is a "Claims" table with the following columns: ID, Type, Status, Date Submitted, Date Paid, Date From-To, and Claim Amount. The table contains summary rows for Submitted Amount, Approved Amount, Paid Total, and Total, all showing \$0.00. A "Return to Components" link is located in the top right corner of the table area. The text "Last Edited By:" is visible at the bottom right of the table area.

2. Click "Add" to create a new Claim

The screenshot shows the "Claim General Information" form. The top navigation bar is identical to the previous screenshot, with the "Add" button highlighted. The form includes the following fields:

- Claim Type: \* Reimbursement (dropdown menu)
- Report Period: Two date input fields labeled "From Date" and "To Date".

A note above the form states: "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."

3. Leave the Claim Type as "Reimbursement." This is automatically populated for you. Note: WRGB only pays Grantees in arrears
4. Enter the Report Period (billing period) for the Invoice
5. Click "Save"

The screenshot shows the "Reporting Period" form. The top navigation bar is identical to the previous screenshots, with the "Add" button highlighted. The form displays the following information:

- Claim Type: \* Reimbursement
- Claim Status: \* Editing
- Report Period: 10/01/2020 (From Date) to 12/31/2020 (To Date)

A "Return to Components" link is located in the top right corner. The text "Last Edited By: Testing Tester, 02/04/2021" is visible at the bottom right of the form area.

6. Click "Return to Components." This will bring you to the Claims Components (see below)

# CDFW WebGrants Claims

## Grantee Guidance

Components		<a href="#">Preview</a>   <a href="#">Submit</a>
Complete each component of the Claim and mark it as complete. Click Submit when you are done.		
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>		

## Find an Existing Claim

If you have already created a Claim and need to return to it, you can find the Claim in either of these ways:

### Option 1 – My Grants Claims List

 **Grant Tracking**

Current Grants							<a href="#">Search My Grants</a>   <a href="#">Closed Grants</a>   <a href="#">Claims</a>
Grants in the status Underway or Suspended appear on this list. To view other Grants, click the closed Grants link.							
ID	Status	Year	Project Title	Program Area	Grant Administrator	Awarded Amount	
03025	Underway	2019	KEEP - Full application #3	TEST PROGRAM AREA	Juan Calderon	\$104,999.00	
03622	Underway	2019	KEEP- EM - Testing Amendments	TEST PROGRAM AREA	Juan Calderon	\$300,006.00	
Q000TEST	Underway	2019	Grantee Training TEST GRANT	TEST PROGRAM AREA	Erin Aquino-Carhart	\$1,000,000.00	
P999876	Underway	2018	2019 WebGrants Training - FRGP Test Grant 1 M to Z	FRGP - Fisheries Restoration Grant Program	Timothy Chorey	\$131,157.50	
P999554	Underway	2018	2019 WebGrants Training - FRGP Test Grant 1 A to L	FRGP - Fisheries Restoration Grant Program	Timothy Chorey	\$8,273,853,491.51	
00300	Underway	2018	FRGP 2018/19 Funding Opportunity Review	FRGP - Fisheries Restoration Grant Program	Timothy Chorey	\$24,480.00	
TEST1234	Underway		TEST GRANT 1234	TEST PROGRAM AREA	Erin Aquino-Carhart	\$0.00	
1724057 - KEEP	Underway		Budget Switcheroo - KEEP	TEST PROGRAM AREA	Erin Aquino-Carhart	\$11,055,826.00	
<b>Total</b>					<b>\$8,286,469,960.01</b>		

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1. From the My Grants Page, click “Claims.” This will open the a list of all your Claims that have not been submitted.

Claims							
Claim Number	Status	Submitted Date	Grant Title	Funding Opportunity	Program Area	Approval Level	Claim Amount
<a href="#">01996-001</a>	Editing		Test_Ramsey_Salmon_SHEAR	01700 - FRGP 2019 Funding Opportunity	FRGP - Fisheries Restoration Grant Program		\$0.00
<a href="#">02908-002</a>	Editing		HS test after new budget tweaks 2019-0301	00832 - Training (All Programs)	TEST PROGRAM AREA		\$0.00
<a href="#">03142-005</a>	Editing		FRGP Legacy testing #2 - JC	03117 - FRGP Legacy	FRGP - Fisheries Restoration Grant Program		\$200,000.00
<a href="#">03241-06-002</a>	Editing		Grant Manager Training 06 - Lasko	00832 - Training (All Programs)	TEST PROGRAM AREA		\$200,000.00
<a href="#">03241-ERA-004</a>	Editing		Grantee Training TEST GRANT	00832 - Training (All Programs)	TEST PROGRAM AREA		\$5,300.00
<a href="#">03241-JRR-002</a>	Editing		Grant Manager Training 00 - JRR	00832 - Training (All Programs)	TEST PROGRAM AREA		\$0.00
<a href="#">P999554-001</a>	Editing		2019 WebGrants Training - FRGP Test Grant 1 A to L	00002 - FRGP 2018/19 Funding Opportunity	FRGP - Fisheries Restoration Grant Program		\$0.00
<a href="#">P999876-002</a>	Editing		2019 WebGrants Training - FRGP Test Grant 1 M to Z	00002 - FRGP 2018/19 Funding Opportunity	FRGP - Fisheries Restoration Grant Program		\$0.00
<a href="#">TEST1234-001</a>	Editing		TEST GRANT 1234	00000 - TEST ONLY FO - DO NOT PURGE AND DO NOT POST	TEST PROGRAM AREA		\$0.00

2. Click the “Claim Number” to open the Claim. This will directly open the Claim Components page for that Claim

### Option 2 – Grant Components

1. From the Grant Main Page, click “Claims.” This will open the Claims Main Page

# CDFW WebGrants Claims

## Grantee Guidance

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
TEST1234 - 001	Payment	Editing			-	\$0.00
					Submitted Amount	\$0.00
					Approved Amount	\$0.00
					Paid Total	\$0.00
					Total	\$0.00

Last Edited By:

2. Click on the "ID" of the Claim. This will open the Claim Components page

## Complete a Claim

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>			

The Claims Components are individual forms that make a WG Claim. Each component must be completed (have a checkmark in the "Complete?" column) before submitting the Claim.

Note: You can still edit components after they are marked as complete.

## Reimbursement

The Reimbursement Component is where you enter the expenses for the Reporting Period. The line items and amounts are populated from the Budget. If the line items do not match your Agreement or current Amended Budget, please contact your CDFW Grant Manager.

1. Click "Reimbursement"
2. Enter the Invoice's expenses for each line item in "Expenses This Period"
  - a. **Important Note: If you see a Totals field, please leave it as \$0.00 (see below). Entering an amount here will create a calculation error.** The total will be calculated for you after the form is saved.
  - b. Note: These fields accept both positive and negative numbers. Negative numbers can be used to adjust or correct line items. If you are making an adjustment, be sure to include it in the [Description of Services Performed](#).

# CDFW WebGrants Claims

## Grantee Guidance

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

3. Click "Save"

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>\$797,014.81</b>
	<b>Total:</b>	<b>\$1,000,000.00</b>	<b>\$202,985.19</b>	<b>\$0.00</b>	<b>\$797,014.81</b>

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

4. Double check the Expenses This Period against your Invoice
  - a. If you need to edit the Reimbursements, click "Edit" at the top right of the screen
  - b. Make edits, as necessary
  - c. Click "Save"
5. Check that there are no negative amounts in the Available Balance (Unpaid)
  - a. Note: Negative amounts will be in parentheses, e.g., (\$200) = -\$200
6. Click "Mark as Complete." This will return you to the Claims Components page

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>			

# CDFW WebGrants Claims

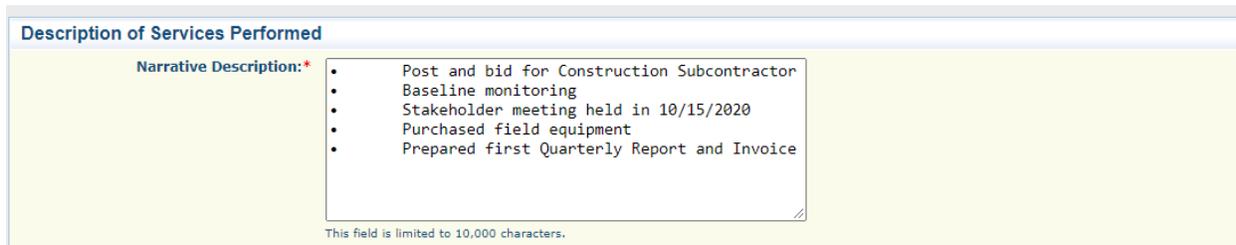
## Grantee Guidance

### Description of Services Performed

The Description of Services Performed is where you describe what project activities have been done during the Reporting Period, justifying the expenses claimed.

It is also where you would describe any adjustments made to the Invoice. For example, the Grantee mistakenly overcharged a line item in the previous Invoice, so the amount is corrected in the [Reimbursement](#) "Expenses This Period" column, and the Grantee explains why the adjustment was made in the Description of Services Performed.

1. Click "Description of Services Performed"
2. Copy and paste the Description of Services Performed from the Invoice into the text box



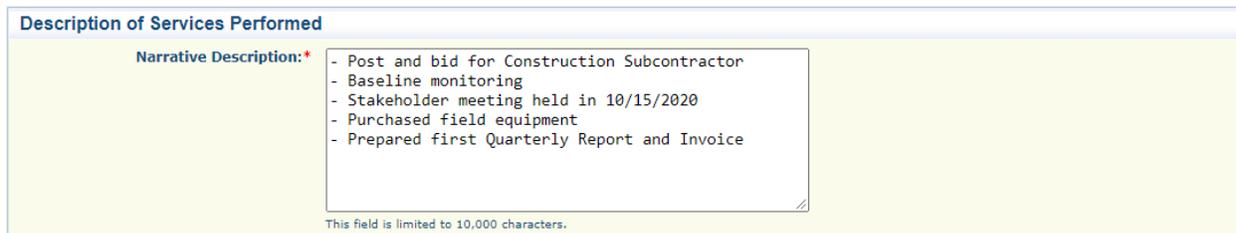
The screenshot shows a text box titled "Description of Services Performed" with a "Narrative Description:" label. The text inside the box is a bulleted list: "Post and bid for Construction Subcontractor", "Baseline monitoring", "Stakeholder meeting held in 10/15/2020", "Purchased field equipment", and "Prepared first Quarterly Report and Invoice". A note at the bottom of the box states "This field is limited to 10,000 characters."

3. Click "Save"



The screenshot shows the same text box after saving. The text is now preceded by question marks: "? Post and bid for Construction Subcontractor", "? Baseline monitoring", "? Stakeholder meeting held in 10/15/2020", "? Purchased field equipment", and "? Prepared first Quarterly Report and Invoice". The "Narrative Description:" label is now followed by a question mark. In the top right corner, there are links for "Mark as Complete" and "Go to Claim Forms". A note at the bottom of the box states "This field is limited to 10,000 characters." In the bottom right corner, it says "Last Edited By: Testing Tester, 02/05/2021".

4. Check the text box entry for errors and edit as necessary. Some characters turn into question marks after the page is saved.
  - a. Click "Edit" at the top right of the screen



The screenshot shows the text box after editing. The text is now preceded by dashes: "- Post and bid for Construction Subcontractor", "- Baseline monitoring", "- Stakeholder meeting held in 10/15/2020", "- Purchased field equipment", and "- Prepared first Quarterly Report and Invoice". The "Narrative Description:" label is now followed by a dash. A note at the bottom of the box states "This field is limited to 10,000 characters."

- b. Make edits. (The example above changed the question marks to dashes.)
  - c. Click "Save"
5. Click "Mark as Complete." This will return you to the Claims Components

# CDFW WebGrants Claims

## Grantee Guidance

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>	✓	02/05/2021	
<a href="#">Claim Supporting Documentation</a>			

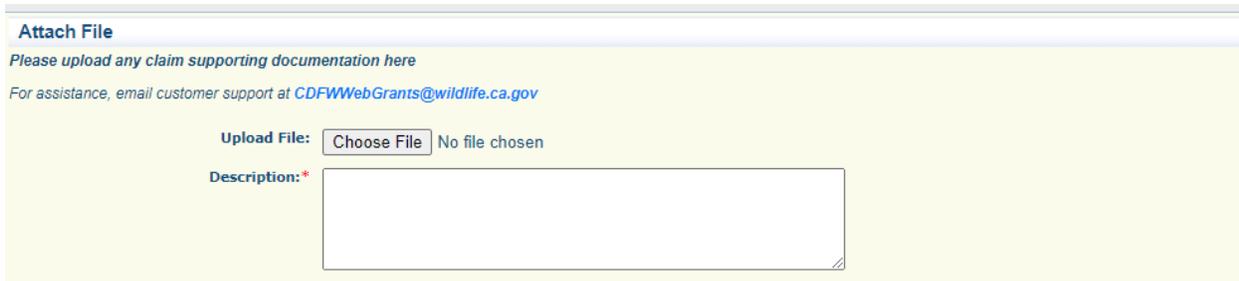
### Claim Supporting Documentation

The Claim Supporting Documentation Component is where you upload the Invoice and any Supporting Documentation to submit with your Claim. The Invoice is a required upload. Your Claim cannot be approved without it.

1. Click "Claim Supporting Documentation"



2. Click "Add"

A screenshot of the 'Attach File' form. The form has a title 'Attach File' and a subtitle 'Please upload any claim supporting documentation here'. Below this, there is a link for customer support: 'For assistance, email customer support at CDFWebGrants@wildlife.ca.gov'. The form contains two main fields: 'Upload File:' with a 'Choose File' button and the text 'No file chosen', and 'Description:\*' with a large text input area. The 'Add' button from the previous screenshot is visible in the top right corner of the form area.

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

A screenshot of the 'Attach File' form, similar to the previous one but with data entered. The 'Upload File:' field now shows 'Choose File' and 'Q000TEST\_...oice01.docx'. The 'Description:\*' text box contains the text: 'Q000TEST Invoice 01 for work performed 10/01/2020-12/31/2020'.

5. Click "Save"

# CDFW WebGrants Claims

## Grantee Guidance

**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
Q000TEST Invoice 01 for work performed 10/01/2020-12/31/2020	Q000TEST_Invoice01.docx	15 KB	02/05/2021

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

- Repeat steps 2-5 until all Claim Supporting Documents are uploaded

**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
Q000TEST Invoice 01 (10/01/2020-12/31/2020)	Q000TEST_Invoice01.docx	15 KB	02/05/2021
Q000TEST Invoice 01 Supporting Doc - Engineering Subcontractor Invoice	Q000TEST_Invoice01_EngineeringSubInvoice.docx	15 KB	02/05/2021

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

- If you need to edit any of these entries, click the Description and edit as necessary
  - Note: To replace a file, you must delete it and upload a new file

[Menu](#) | [Help](#) | [Log Out](#) [Back](#) | [Print](#) | [Add](#) | [Delete](#) | [Edit](#) | [Save](#)

**Application**

**Attach File**

Upload File: Q000TEST\_Invoice01.docx

Description: \*

- Click "Mark as Complete." This will return you to the Claims Components

**Components** [Preview](#) [Submit](#)

Complete each component of the Claim and mark it as complete. Click Submit when you are done.

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>	✓	02/05/2021
<a href="#">Claim Supporting Documentation</a>	✓	02/05/2021

## Review the Claim

After you finish entering all the information for your Claim, make sure you check for errors or any missing documents before submitting it. Use the Preview function to read the entire Claim on one page (see below for example of a Claim Preview).

- Click "Preview"
- Review the entire Claim
- If edits are necessary, click the WG "Back" button and make your edits in the appropriate component

# CDFW WebGrants Claims

## Grantee Guidance

### 4. Check that all components are marked as complete

#### Reimbursement

Budget Category	Contract Budget	Expenses This Period	Prior Expenses	Total	Available Balance
<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>

#### 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

Description	File Name	File Size
Q000TEST Invoice 01 (10/01/2020-12/31/2020)	Q000TEST_Invoice01.docx	15 KB
Q000TEST Invoice 01 Supporting Doc - Engineering Subcontractor Invoice	Q000TEST_Invoice01_Engineering SubInvoice.docx	15 KB

## Submitted Status

The Claim [Submitted Status](#) is when the WG Claim is submitted for CDFW review.

**Important Note:** You cannot edit your Claim after it is submitted.

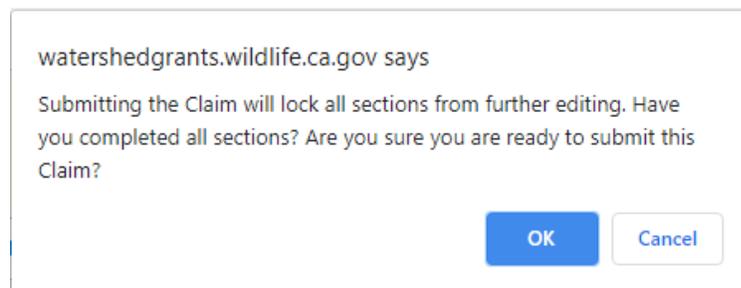
## Submit a Claim

Components	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>	✓	02/05/2021
<a href="#">Claim Supporting Documentation</a>	✓	02/05/2021

1. Click "Submit." You will receive the following popup warning

# CDFW WebGrants Claims

## Grantee Guidance



watershedgrants.wildlife.ca.gov says

Submitting the Claim will lock all sections from further editing. Have you completed all sections? Are you sure you are ready to submit this Claim?

OK Cancel

2. If you are sure the Claim is complete and ready for submission, click “OK”
3. 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.

4. 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.

You are now finished submitting your Claim. You can return to the Grant Components (Grant Main Page) by clicking the WG “Back” button or log out.

## Claim Negotiation

While you are waiting for your Invoice to be approved, you may be contacted for more information or corrections if the CDFW Grant Manager finds an issue with the

1. Invoice (e.g., line item overage, new line items without an amendment),
2. WG Claim (e.g., data entry error, missing uploads), or
3. Due deliverables (i.e., deliverables are not submitted on time or need revising)

The CDFW Grant Manager will dispute the Invoice and work with you to resolve the issue. In WebGrants, the invoice dispute notification and corrections are handled in the Claim negotiation process.

## Correcting Status

The Claim [Correcting Status](#) is when the CDFW Grant Manager sends back (“negotiates”) the submitted Claim to the Grantee for corrections.

## Claim Negotiation Email

You will receive an email notifying you that

1. The Claim needs corrections
2. When corrections are due
3. What specifically needs to be addressed
4. The Claim cannot be paid until the corrections are made

# CDFW WebGrants Claims

## Grantee Guidance

The email will also include an invoice dispute notification and other relevant attachments for the negotiation.

### Example Claim Negotiation Email

## Correcting the Claim

When the Claim is in Correcting Status, you can open and edit it to make your corrections.

1. From your Grant Main Page, click "Claims"

Claims					Copy Existing Claim   Return to Components	
ID	Type	Status	Date Submitted	Date Paid	Date From-To	Claim Amount
Q000TEST - 001	Reimbursement	Correcting	02/05/2021		10/01/2020 - 12/31/2020	\$202,985.19
					Submitted Amount	\$0.00
					Approved Amount	\$0.00
					Paid Total	\$0.00
					Total	\$202,985.19

2. Click the ID of the Claim you need to correct
  - a. Note: the Claim will be in Correcting Status

# CDFW WebGrants Claims

## Grantee Guidance

Components <span style="float: right;"><a href="#">Preview</a>   <a href="#">Submit</a></span>		
<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>		02/11/2021
<a href="#">Claim Supporting Documentation</a>		02/11/2021

3. Make the corrections as directed in the Claim Negotiation Email.
  - a. See [Complete a Claim Section](#) above for instructions on updating each component

Claim Supporting Documentation <span style="float: right;"><a href="#">Mark as Complete</a>   <a href="#">Go to Claim Forms</a></span>			
<i>Please upload any claim supporting documentation here</i>			
<i>For assistance, email customer support at <a href="mailto:CDFWebGrants@wildlife.ca.gov">CDFWebGrants@wildlife.ca.gov</a></i>			
Description	File Name	File Size	Date Uploaded
<a href="#">Q000TEST Invoice 01 - Original</a>	<a href="#">Q000TEST_Invoice01.docx</a>	15 KB	02/11/2021
<a href="#">Q000TEST Invoice 01 Supporting Doc - Engineering Subcontractor Invoice</a>	<a href="#">Q000TEST_Invoice01_Engineering SubInvoice.docx</a>	15 KB	02/11/2021
<a href="#">Q000TEST Invoice 01 - Revised</a>	<a href="#">Q000TEST_Invoice01_Revised.docx</a>	15 KB	02/17/2021

Last Edited By: Testing Tester, 02/17/2021

- ii. Claim Supporting Documentation: If uploading a [Revised Invoice](#)
      - i. Click on the [Original Invoice](#) and edit the description to mark the file as “[Agreement Number] Invoice [Number of Invoice] – Original”
      - ii. Upload the Revised Invoice
4. Mark all Claim Components as complete
5. Check that all corrections were made appropriately
6. [Submit Claim](#)

The CDFW Grant Manager will let you know if the corrections resolve the invoice dispute or if more information is necessary.

# CDFW WebGrants Claims

## Grantee Guidance

### Glossary

**Approved:** The status when a CDFW Grant Manager has approved a Claim in WG

**Claim:** The WG process where Invoices are submitted for payment and tracked through WG Grant Tracking

**Correcting:** The status when a CDFW Grant Manager negotiated a Claim back to the Grantee. It is the WG part of the invoice dispute process

**Editing:** The status when a Claim is being created in WG and is not ready for CDFW review

**Original Invoice:** The Grantee Invoice that was submitted in the initial Claim, before the CDFW Grant Manager review

**Paid:** The status when the Invoice has been submitted to State Controller's Office Fi\$Cal system for payment processing. Please contact your CDFW Grant Manager if you do not receive payment after 45 days of submitting your Claim.

**Revised Invoice:** The Grantee Invoice that was revised and resubmitted in Claims Negotiations to resolve an invoice dispute

**Submitted:** The status when a Claim is submitted in WG and ready for CDFW review. The Grantee can no longer edit the Claim after it is submitted

**Withdrawn:** The status when a Claim is removed from the payment process. This can be done in any status except Paid. We **do not** recommend withdrawing through WG. Please contact your CDFW Grant Manager if you want to withdraw a Claim submission