



WRGB WEBGRANTS GUIDANCE

Submitting Claims/Invoices in WebGrants

FOR GRANTEES

The Grantee's Role in WebGrants

WebGrants is WRGB's online application/grant tracking system and includes:

- Invoice/claim processing
- Document storage
- Expenditure tracking

Grantees are required to submit invoices (via claims) for reimbursement and payment. The claims you submit must include all information / documents outlined in your grant agreement!

Invoice/Claim Process

Invoices vs. Claims

Invoice

- The document that fulfills all requirements for reimbursement or payment (per the grant agreement)
- Is provided on the CDFW Invoice Template, or a pre-approved grantee template

Claim

- The WebGrants process to submit the invoice and any related data

The WebGrants Claim Process

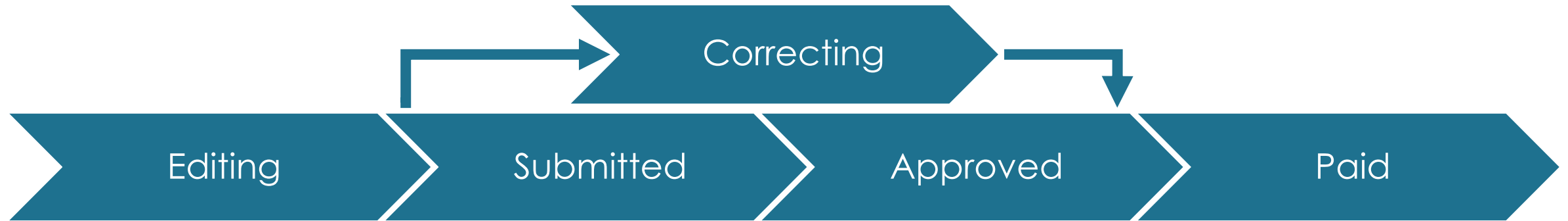


The entire process is handled through WebGrants:

- Grantee invoice submission
- CDFW Grant Manager review and approval
- Invoice dispute notification and resolution (if needed)

Check your agreement for invoice requirements (info and documentation) to ensure you submit a complete claim.

Claim Statuses (Stages)



Claim statuses show where it is in the WebGrants process:

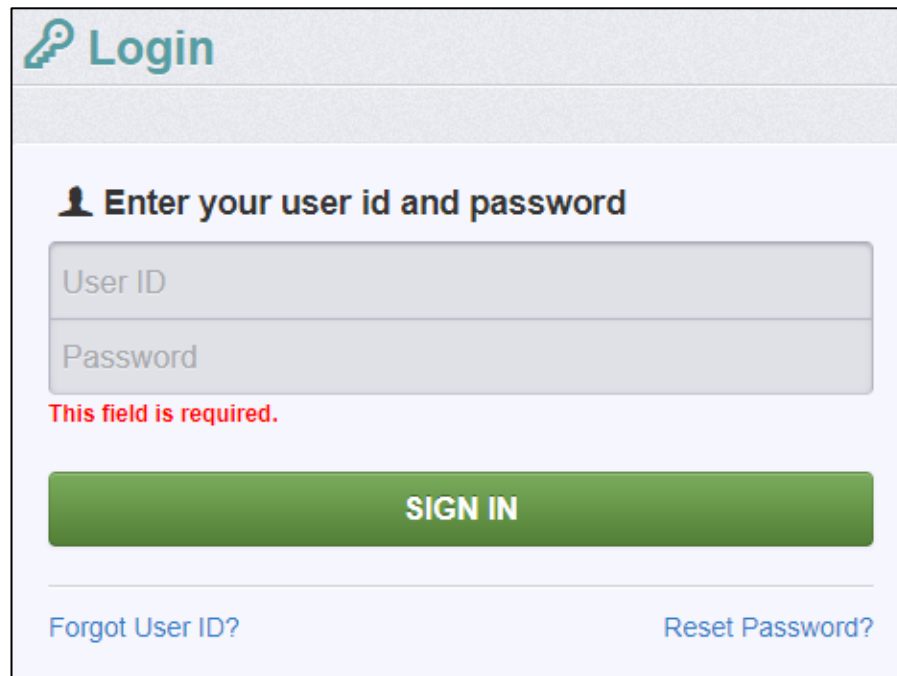
- Editing: Grantee enters data and uploads documents
- Submitted: Grantee can no longer edit, officially under WRGB review
- Correcting: WRGB disputes invoice and Grantee corrects issue(s)
- Approved: WRGB approves claim
- Paid: WRGB submits invoice to SCO
 - This does not mean a check has been cut yet, only that payment is in process. Payments are made through Fi\$Cal system (which is separate from WebGrants).

Claim Walkthrough

Step 1: Access WebGrants

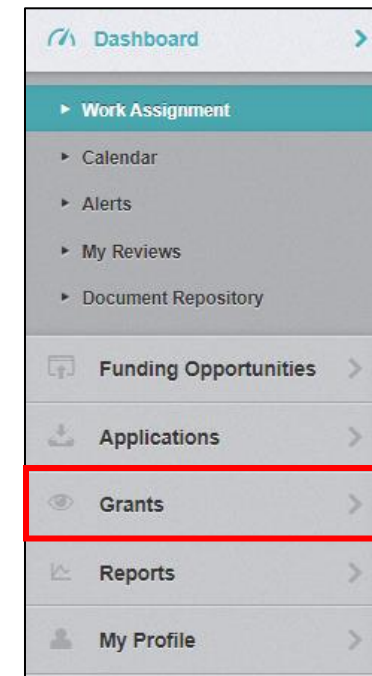
Log in to [WebGrants](#) using your ID and password. If you forget either of these, please click the “Forgot” links.

Once logged in, select “Grants” from the sidebar panel menu.



The screenshot shows the login page with the following elements:

- Header: **Login** with a key icon.
- Instruction: **Enter your user id and password** with a person icon.
- Input fields: **User ID** and **Password**.
- Validation: **This field is required.** (in red text) below the Password field.
- Button: **SIGN IN** (green button).
- Links: [Forgot User ID?](#) and [Reset Password?](#)



The screenshot shows the dashboard sidebar menu with the following items:

- Dashboard** (with a refresh icon and a right arrow)
- Work Assignment** (with a right arrow)
- Calendar** (with a right arrow)
- Alerts** (with a right arrow)
- My Reviews** (with a right arrow)
- Document Repository** (with a right arrow)
- Funding Opportunities** (with a right arrow)
- Applications** (with a right arrow)
- Grants** (with a right arrow, highlighted with a red box)
- Reports** (with a right arrow)
- My Profile** (with a right arrow)

Step 2: Select a Grant


You will see a list of your current grants. To open a specific grant, click anywhere on that row.

☰ Current Grants									
All active grants are listed below.									
								Search:	<input type="text"/>
ID	Status	Year	Title	Organization	Program Area	Funding Opportunity	Duration	Grant Amount	
SK12345	Underway	2021	FRGP Testing Grant	BaseLine Organization	FRGP-FRGP - Fisheries Restoration Grant Program	1724915-FRGP 2021 Funding Opportunity	-	\$407,030.00	
02856	Underway	2019	HS Test application 2 - 2019-0222	BaseLine Organization	TPA-TEST PROGRAM AREA	00832-Training (All Programs)	-	\$323,720.20	
03025	Underway	2019	KEEP - Full application #3	BaseLine Organization	TPA-TEST PROGRAM AREA	02951-TEST - For Pre-Application and Application Testing	-	\$104,999.00	
03140	Underway	2019	FRGP Legacy testing #1 - JC	BaseLine Organization	FRGP-FRGP - Fisheries Restoration Grant Program	03117-FRGP Legacy	-	\$300.00	

Step 3: View a Grant

Selecting a specific grant will bring up its Grant Components menu.

Click “Claims” to open a list of all the grant’s claims.



The screenshot shows a web interface titled "Grant Components". Below the title is a light blue informational box with the text: "The grant forms appear below. Your grant award details are saved here, as well as many forms which may be used to manage your grant." Below this box is a vertical list of menu items: "Component", "General Information", "Project Status and Descriptions", "Agreement / Amendments", "FRGP Budget", "Claims", and "Cost Share". The "Claims" item is highlighted with a red rectangular border.

Component
General Information
Project Status and Descriptions
Agreement / Amendments
FRGP Budget
Claims
Cost Share

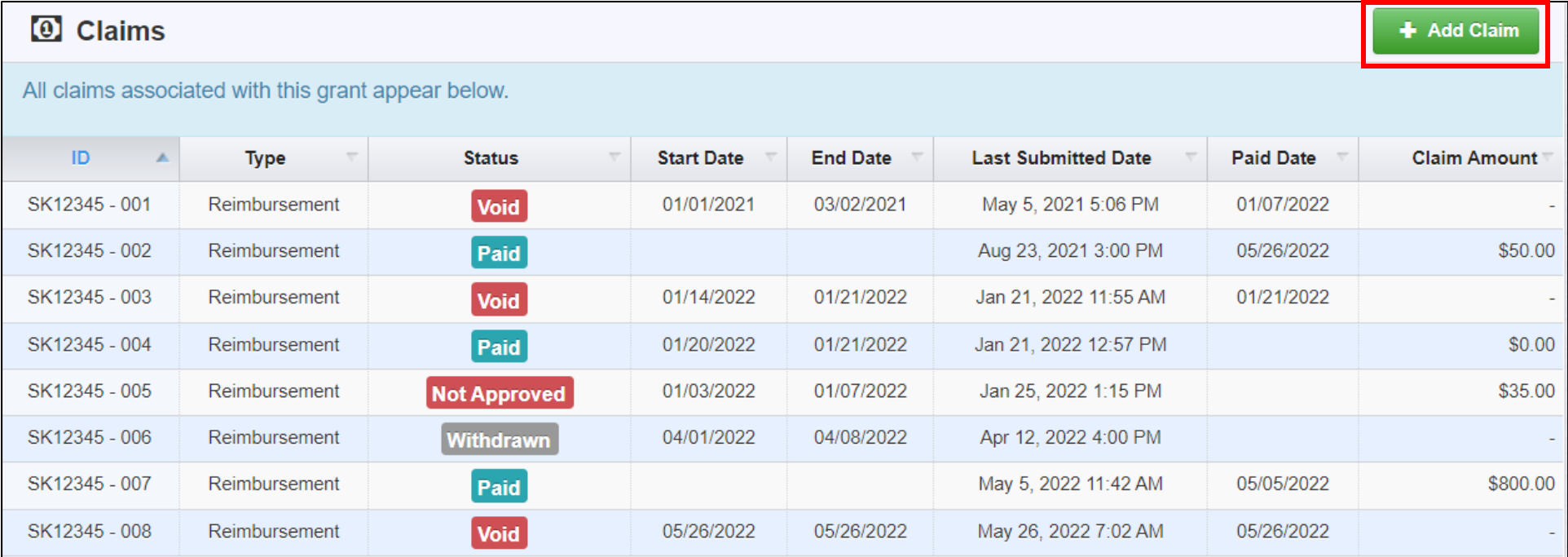
Step 4: Claims List

All the grant's claims will be listed. Claims cannot be deleted, so please ensure you enter info correctly before submitting to minimize mistakes.

Claims + Add Claim							
All claims associated with this grant appear below.							
ID	Type	Status	Start Date	End Date	Last Submitted Date	Paid Date	Claim Amount
SK12345 - 001	Reimbursement	Void	01/01/2021	03/02/2021	May 5, 2021 5:06 PM	01/07/2022	-
SK12345 - 002	Reimbursement	Paid			Aug 23, 2021 3:00 PM	05/26/2022	\$50.00
SK12345 - 003	Reimbursement	Void	01/14/2022	01/21/2022	Jan 21, 2022 11:55 AM	01/21/2022	-
SK12345 - 004	Reimbursement	Paid	01/20/2022	01/21/2022	Jan 21, 2022 12:57 PM		\$0.00
SK12345 - 005	Reimbursement	Not Approved	01/03/2022	01/07/2022	Jan 25, 2022 1:15 PM		\$35.00
SK12345 - 006	Reimbursement	Withdrawn	04/01/2022	04/08/2022	Apr 12, 2022 4:00 PM		-
SK12345 - 007	Reimbursement	Paid			May 5, 2022 11:42 AM	05/05/2022	\$800.00
SK12345 - 008	Reimbursement	Void	05/26/2022	05/26/2022	May 26, 2022 7:02 AM	05/26/2022	-

Step 5: Create a New Claim

From the claims list, click “Add Claim” at the top of the screen to begin a new claim in WebGrants.



The screenshot shows a web interface for managing claims. At the top left, there is a header 'Claims' with a lock icon. At the top right, there is a green button labeled '+ Add Claim' which is highlighted with a red rectangular box. Below the header, a light blue banner contains the text 'All claims associated with this grant appear below.' Below this banner is a table with the following columns: ID, Type, Status, Start Date, End Date, Last Submitted Date, Paid Date, and Claim Amount. The table contains eight rows of data, each representing a claim with various statuses such as Void, Paid, Not Approved, and Withdrawn.

ID	Type	Status	Start Date	End Date	Last Submitted Date	Paid Date	Claim Amount
SK12345 - 001	Reimbursement	Void	01/01/2021	03/02/2021	May 5, 2021 5:06 PM	01/07/2022	-
SK12345 - 002	Reimbursement	Paid			Aug 23, 2021 3:00 PM	05/26/2022	\$50.00
SK12345 - 003	Reimbursement	Void	01/14/2022	01/21/2022	Jan 21, 2022 11:55 AM	01/21/2022	-
SK12345 - 004	Reimbursement	Paid	01/20/2022	01/21/2022	Jan 21, 2022 12:57 PM		\$0.00
SK12345 - 005	Reimbursement	Not Approved	01/03/2022	01/07/2022	Jan 25, 2022 1:15 PM		\$35.00
SK12345 - 006	Reimbursement	Withdrawn	04/01/2022	04/08/2022	Apr 12, 2022 4:00 PM		-
SK12345 - 007	Reimbursement	Paid			May 5, 2022 11:42 AM	05/05/2022	\$800.00
SK12345 - 008	Reimbursement	Void	05/26/2022	05/26/2022	May 26, 2022 7:02 AM	05/26/2022	-

Step 6: Claim General Information

Enter the General Information:

- Status will be auto-generated
- Set the claim type to Reimbursement
 - Do **not** set as Payment – this is only for Advanced Payments. Doing so will result in the Grant Manager asking you to withdraw and resubmit correctly!
- Due date does not apply
- Enter report period (dates) to match billing period of invoice
- Select “Yes” for final request **only** if this is the final/last claim
- “Save Form” when done

Status*:

Type*: Reimbursement ▾

Due Date:

Report Period: 07/01/2024 07/31/2024

Start Date End Date


Final Request? Yes No

Click Yes if this is the final request. Click Yes if this is the final request

General Information - Claim - Edit Save Form

Step 7: Claim Components

After saving, you will see the Claim Details. These are the individual components that make up a claim. Click the names of each component to open and edit them.

 **Claim Details** [Preview Claim](#)

Claim cannot be Submitted Currently

- Claim components are not complete

Component	Complete?	Last Edited
General Information	✓	Aug 20, 2024 4:04 PM - Testing Tester
Reimbursement	-	
Description of Services Performed	-	
Claim Supporting Documentation	-	

Step 8: Reimbursement

Click “Edit Reimbursement”.
Fill in “Expenses This Period”
for each line-item:

- Check the figures against the invoice / your records!
- You may need to scroll down to fill in each line-item
- “Save Reimbursement” when done.

Reimbursement - Current Version

[Edit Reimbursement](#)



- Edit

[Save Reimbursement](#)

Budget Category	Contract Budget	Expenses This Period	Prior Expenses (Paid)	Total	Available Balance (Unpaid)
---FORM: Budget---					
Personnel Services					
Bookkeeper	\$4,200.00	<input type="text" value="100."/>	\$99.00	\$99.00	\$4,101.00
Executive Director	\$16,800.00	<input type="text" value="0.00"/>	\$199.00	\$199.00	\$16,601.00
Program Associate	\$10,400.00	<input type="text" value="330"/>	\$70.00	\$70.00	\$10,330.00
Project Assistant	\$9,600.00	<input type="text" value="0.00"/>	\$0.00	\$0.00	\$9,600.00
Staff Benefits					
Staff Benefit Subtotal	\$11,880.00	<input type="text" value="280"/>	\$0.00	\$0.00	\$11,880.00
General Operating Expenses					
Conference Printed Materials	\$12,900.00	<input type="text" value="50"/>	\$50.00	\$50.00	\$12,850.00

Step 9: Description of Services Performed

Enter the narrative description from the invoice that is consistent with the scope of work performed into the text box. “Save Form” when done.

 **Description of Services Performed** 

Narrative Description*:

This is where you will input your description of services performed for the billing period. The narrative description should be consistent with the scope of work outlined in the agreement and the costs identified in the invoice. You can copy and paste the description from the invoice into this text box.

This field is limited to 10,000 characters.

Step 10: Claim Supporting Documents

Click “Add New Attachment” to open the file attachment screen:

- Click “Select File” to upload a document (you can change or remove the file, if needed)
- Enter a short description of the file
- “Save File” when done

Note: You can only upload 1 file at a time. Repeat for each document.

- Other Attachments

✓ Mark as Complete + Add New Attachment

Description	File Name	Type	Size	Upload Date	Delete
No files attached.					

Attach File

Save File Cancel

Upload File*: Select file

Description*:

500 character(s) left

Attach File

Save File Cancel

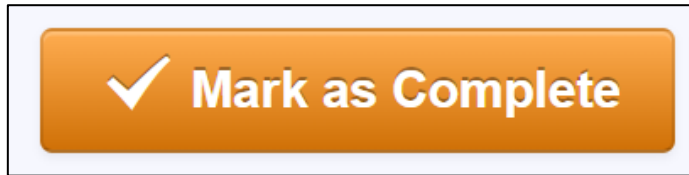
Upload File*: Change Remove

Description*:

387 character(s) left

Step 11: Mark as Complete

As you finish each component, click “Mark as Complete”.



Doing so will place a checkmark in the “Complete?” column.

Each component must be completed before submitting the claim.

Claim Details			Withdraw	Preview Claim
Claim cannot be Submitted Currently • Claim components are not complete				
Component	Complete?	Last Edited		
General Information	✓	Aug 20, 2024 3:57 PM - Testing Tester		
Reimbursement	✓	Aug 20, 2024 4:14 PM - Testing Tester		
Description of Services Performed		Aug 20, 2024 4:22 PM - Testing Tester		
Claim Supporting Documentation		Aug 20, 2024 4:28 PM - Testing Tester		



Claim Details			Submit Claim	Withdraw	Preview Claim
Claim is in compliance and is ready for Submission!					
Component	Complete?	Last Edited			
General Information	✓	Aug 20, 2024 3:57 PM - Testing Tester			
Reimbursement	✓	Aug 20, 2024 4:14 PM - Testing Tester			
Description of Services Performed	✓	Aug 20, 2024 4:22 PM - Testing Tester			
Claim Supporting Documentation	✓	Aug 20, 2024 4:28 PM - Testing Tester			



Step 12: Submit Claim

Click “Submit Claim” once you have completed entering info:

- A popup warning will indicate no further edits are allowed
- Click “Submit” on the popup to complete submission

Component	Complete?	Last Edited
General Information	✓	Aug 20, 2024 3:57 PM - Testing Tester
Reimbursement	✓	Aug 20, 2024 4:14 PM - Testing Tester
Description of Services Performed	✓	Aug 20, 2024 4:22 PM - Testing Tester
Claim Supporting Documentation	✓	Aug 20, 2024 4:28 PM - Testing Tester

Please confirm X

Please confirm that you wish to submit this document for review. After submission you will not be able to edit this document.

Disputes and Negotiations

Invoice Dispute Process

The invoice dispute process is done entirely through WebGrants. The Grant Manager fills out the Invoice Dispute Notice (STD 209), which the grantee receives via email.



Claim Negotiation

Grantees will be notified of Claim Negotiation via email which includes the following:

- Grant & claim number
- Summary of issue(s) that need addressing
- A deadline to fix issue(s)
- STD 209 form (as attachment)

The negotiated claim component will be unlocked and editable. Once corrections are made, resubmit the claim (following the steps outlined in this guidance) to continue the review/approval process.

Questions and Issues

Contact Us

If you have questions on how to submit an invoice via the claims process or run into technical issues at any time, please contact:

- WebGrants Help Desk (CDFWWebGrants@wildlife.ca.gov)

Your Grant Manager can also assist with the WebGrants claim process if you have questions!