Grants Gateway
Grantee Claim Submission Training

Preparation

- Be familiar with the requirements and details of your contract

- Know what your program manager or contract manager expects from you in your claim submissions

- Have documents ready prior to logging in

- Be aware of what categories your claims will fall under

- If you have multiple items to claim, make sure you know how much your claims should add up to

- Ensure you have the right role to submit your claim

Preparation: Know the Details of your Contract

- Is there an advance allowed?
  - Refer to Section III B of the State Terms and Conditions in the your Grant contract
  - Refer to Section I A of Attachment D of your contract for your specific advance details
  - For OVS CMS Contracts, advances are not allowed for Municipalities
  - For NFPs, a 25% advance is allowed
- How often are claims allowed or required?
  - Refer to Section I B of Attachment D of your contract for your specific claim requirements
  - Quarterly, due 30 days after the end of the quarter

Preparation: Program Expectations

- Know what your program manager or contract manager expects from you in your claim submissions

- Each agency and program may have different requirements for claim submission
  - OVS would like separate attachments by category

- OVS requires that the FCR (Quarterly Fiscal Cost Report) be included in each claim for payment
  - Upload to category "Other"
  - Label description "FCR Q1"

- Ensure that you have the invoice and proof of payment, and that those items line up with your contract requirements

Preparation: Have Documents Ready

- You will need to provide PDFs as supporting documentation for your claim submissions
  - Ensure that the PDFs are not password protected
  - PDFs must be readable
  - Scans are allowed, but native PDF documents are preferred
- Follow your program/contract manager's guidance for how to prepare these documents
- If your program requires a cover sheet or "roll up" document, ensure that it is saved/scanned as a PDF also
  - The FCR document must be saved as a PDF

Preparation: Log in with the Right Role

- Only a user in the role of Grantee Payment Signatory can submit a claim for payment

- Other roles can start the claim, but can't submit it
  - Grantee System Administrator
  - Grantee Contract Signatory
  - Grantee

- If you do not have the appropriate role, a user in the role of Grantee Delegated Administrator at your organization can add the account

Submit Case Manager Contract Claims Online Only

- All Case Manager contract holders **must** submit their advance and quarterly claims through the Grants Gateway. No paper claims will be accepted.

- Electronic payments only apply to your Case Manager contract(s). The payment process for any existing contract(s) that you hold with OVS will remain unchanged.

- Fringe supporting documentation is not required when submitting a claim

Fiscal Cost Reports (FCRs)

- While Fiscal Cost Reports (FCRs) fare still a required document that must be uploaded for quarterly claims, grantees do **not** have to sign them for Case Manager Contracts.

  – FCRs are still required to be submitted to OVS even if your organization had no expenditures in the first quarter. In this instance, please email the FCR to your contract manager rather than creating a payment in the Gateway.

  – FCR adjustment notices (if applicable) will be uploaded to the Grants Gateway under "Payment Uploads". OVS will notify grantees via email that an FCR adjustment has been made and to refer to the Grants Gateway for more information.

Case Manager Final Claims

- As with our traditional contracts, programs will be allowed 60 days from the end of the 4th quarter to submit their claim. Since the end of the 4th quarter of the case manager contract ends 3/31, grantees will be given until 5/30 to submit their 4th quarter claim.

After your Claim is Submitted

- How do you know it has been submitted?
  - The status will change to Payment in Review
  - You will no longer have a task for that payment or be able to edit it
- How do you follow the progress?
  - Observe the current payment status
  - Review the Payment Schedule Report
  - Look at the Payment Calculation and Coding screen