

ODF-UCF Subrecipient Tutorial: Submitting a Claim

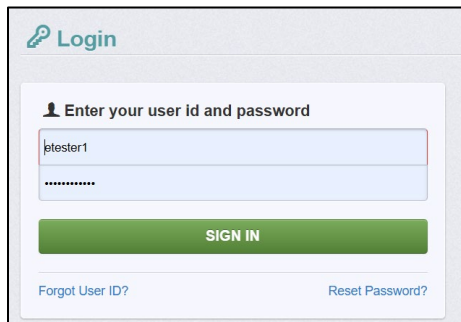
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Claims Tutorial Video

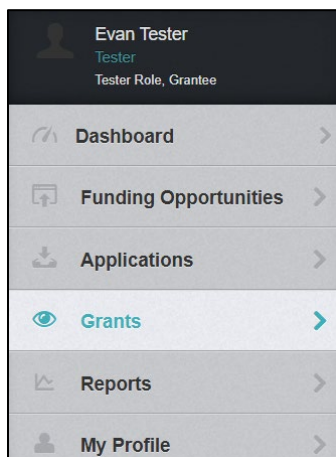
- General Information: 0:00 – 3:45
- Reimbursement Requests: 3:45 – 22:55
- Advance Payment Request: 22:55 – 33:10
- Advance Payment Verification: 33:10 – 38:51

Getting Started

1. Log into the online grant portal ([WebGrants - Oregon Department of Forestry](#)).




2. From the side menu, click on “Grants”.




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3. Select the grant you would like to access in the “Current Grants” listing.

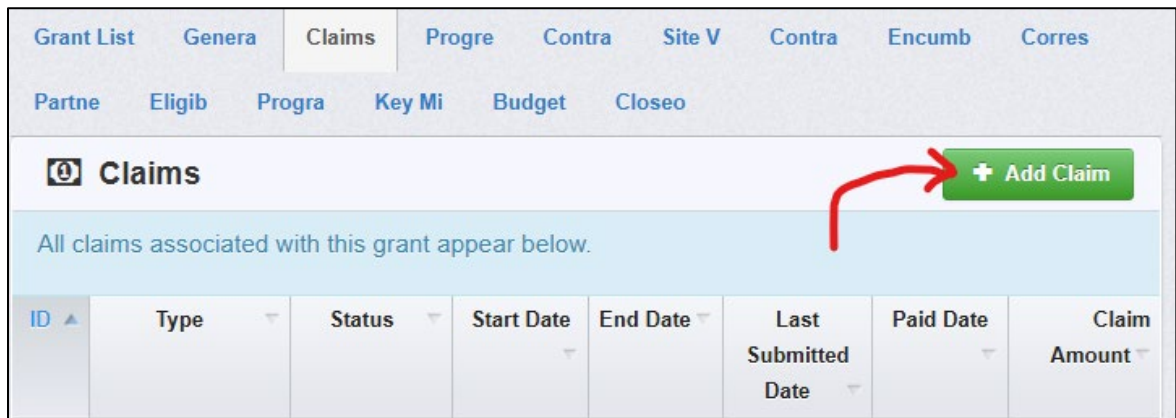
Current Grants Closed Grants Search Claims									
 Current Grants									
All active grants are listed below.									
Search: <input type="text"/>									
ID ▲	Status ▼	Year ▼	Title ▼	Organization ▼	Program Area ▼	Funding Opportunity ▼	Start Date ▼	End Date ▼	Grant Amount ▼
1011	Underway	2024	Evan's Test App - KEEP	BaseLine Tester Organization	UCF-Urban & Community Forestry Program	1010-Growing Equity: Urban & Community Forestry Inflation Reduction Act - 2024	01/01/2024	12/31/2024	\$316,223.00
									\$316,223.00
Showing 1 to 1 of 1 entries									

4. Once you have selected the grant, you will be directed to the Grant Components. Select “Claims” from the list of Grant Components.

 Grant Components	
The grant forms appear below.	
Your grant award details are saved here, as well as many forms w	
Component	
General Information	
Claims	
Progress Reports	
Contract Amendments	
Site Visits	
Contract	
Encumbrances	
Correspondence	
Partner Organizations	
Eligibility Form	
Program/Project Narrative	
Key Milestones	
Budget	
Closeout	
Funding Opportunity	
Application	

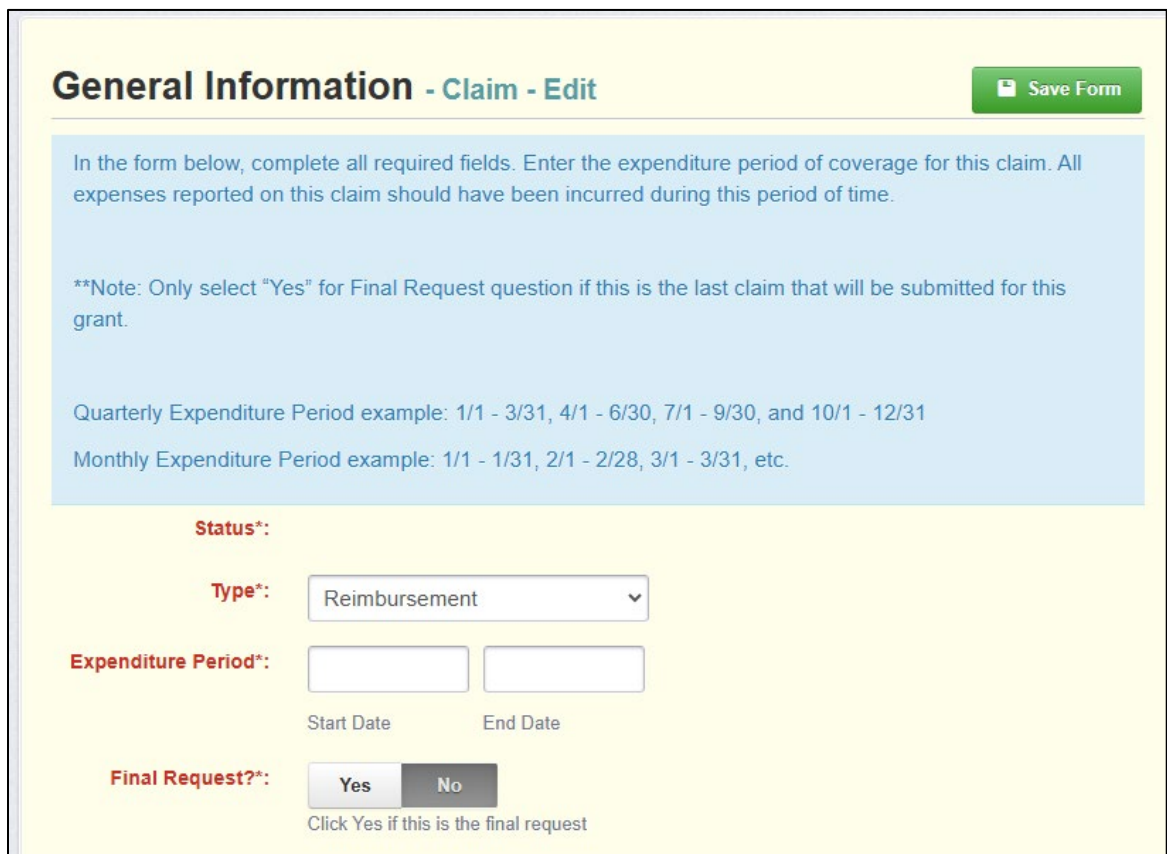
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5. Click “Add Claim”.



The screenshot shows a navigation bar with tabs: Grant List, Genera, Claims (selected), Progre, Contra, Site V, Contra, Encumb, and Corres. Below this is another row of tabs: Partne, Eligib, Progra, Key Mi, Budget, and Closeo. The main content area is titled 'Claims' with a sub-header 'All claims associated with this grant appear below.' A green button with a plus sign and the text '+ Add Claim' is located in the top right corner, with a red arrow pointing to it. Below the sub-header is a table with the following columns: ID, Type, Status, Start Date, End Date, Last Submitted Date, Paid Date, and Claim Amount.

6. You will then be directed to the Claim “General Information” form.



The screenshot shows the 'General Information - Claim - Edit' form. At the top right is a green button labeled 'Save Form'. Below the title is a light blue box containing instructions: 'In the form below, complete all required fields. Enter the expenditure period of coverage for this claim. All expenses reported on this claim should have been incurred during this period of time.' Below this is a note: '**Note: Only select "Yes" for Final Request question if this is the last claim that will be submitted for this grant.' Further down are examples for quarterly and monthly expenditure periods. The form fields include: 'Status*' (a dropdown menu), 'Type*' (a dropdown menu with 'Reimbursement' selected), 'Expenditure Period*' (two date input fields labeled 'Start Date' and 'End Date'), and 'Final Request?*' (radio buttons for 'Yes' and 'No', with 'Yes' selected). A note below the radio buttons says 'Click Yes if this is the final request'.

7. Select from the following “Type” options:

- a. **“Reimbursement”**: A reimbursement request is used for expenses that the subrecipient has paid for up front and is requesting to be repaid by ODF.
- b. **“Advance Payment Request”**: An Advance Payment Request is used by subrecipients who require capital from ODF prior to paying for expenses. These expenses have not yet been incurred by the subrecipient. *Note: All capital advanced by ODF must be spent within 90 days from the day the subrecipient receives the funds.*
- c. **“Advance Payment Verification”**: Advance payment verification is required after any Advance Payment Request to document how the advance payment was used.

The screenshot shows a form with the following fields and options:

- Status*:** (empty)
- Type*:** A dropdown menu is open, showing three options: **Reimbursement** (selected), **Advance Payment Request**, and **Advance Payment Verification**.
- Expenditure Period*:** (empty)
- Final Request?***: Two buttons, **Yes** and **No**. Below the buttons is the text: "Click Yes if this is the final request".

- 8. Enter the Expenditure Period start and end dates.** For example, if you are making a reimbursement request for the first quarter of the year, you would put 01/01/2026 as the start date and 03/31/2026 as the end date.

The screenshot shows the same form as above, but with the 'Expenditure Period' fields filled:

- Status*:** (empty)
- Type*:** A dropdown menu showing **Reimbursement** (selected).
- Expenditure Period*:** Two date input fields. The first field contains **01/01/2026** and is labeled "Start Date" below it. The second field contains **03/31/2026** and is labeled "End Date" below it.
- Final Request?***: Two buttons, **Yes** and **No**. Below the buttons is the text: "Click Yes if this is the final request".


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9. Unless this is the final request (i.e., the last claim that will be submitted for this grant), leave the “Final Request” as “No” (this is the default).


Status*:

Type*: Reimbursement

Expenditure Period*: 01/01/2026 03/31/2026
Start Date End Date

Final Request?* Yes No 
Click Yes if this is the final request

10. Click the “Save Form” button to finish the “General Information” form.

General Information - Claim - Edit 

In the form below, complete all required fields. Enter the expenditure period of coverage for this claim. All expenses reported on this claim should have been incurred during this period of time.

****Note:** Only select “Yes” for Final Request question if this is the last claim that will be submitted for this grant.

Quarterly Expenditure Period example: 1/1 - 3/31, 4/1 - 6/30, 7/1 - 9/30, and 10/1 - 12/31
Monthly Expenditure Period example: 1/1 - 1/31, 2/1 - 2/28, 3/1 - 3/31, etc.

Status*:

Type*: Reimbursement

Expenditure Period*: Start Date End Date

Final Request?* Yes No
Click Yes if this is the final request

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11. When you create a new Claim, you will automatically be directed to the Claim Components list after saving the General Information form. **Note: The claim cannot be submitted until every component is marked as complete with a checkmark in the “Complete?” column.**

The screenshot shows the 'Claim Details' form. At the top, there are tabs: 'Claim Preview', 'Attachments', 'Alert History', and 'Map'. Below the tabs, there's a header bar with a 'Withdraw' button (orange) and a 'Preview Claim' button (blue). A red banner message states: 'Claim cannot be Submitted Currently' with a bullet point: 'Claim components are not complete'. Below this is a table with columns: 'Component', 'Complete?', and 'Last Edited'.

Component	Complete?	Last Edited
General Information	✓	Dec 12, 2025 11:38 AM - Evan Elderbrock
Detail of Expenditure	-	-
Reimbursement Request	-	Dec 15, 2025 10:23 AM - Evan Tester
Claim Supporting Documentation	-	-

12. If you are returning to a claim that you already set up, follow steps 1-4 above, navigate to the claim you want to update from the list of available claims, and click on the “Edit Claim” button.

The screenshot shows a 'Claims' list table. At the top, there are tabs: 'Grant List', 'Genera', 'Claims', 'Progre', 'Contra', 'Site V', 'Contra', 'Encumb', 'Corres', 'Partne', 'Eligib', 'Progra', and 'Key Mi'. Below the tabs, there's a header bar with a '+ Add Claim' button (green). A message states: 'All claims associated with this grant appear below.' The table has columns: 'ID', 'Type', 'Status', 'Start Date', 'End Date', 'Last Submitted Date', 'Paid Date', and 'Claim Amount'.


ID	Type	Status	Start Date	End Date	Last Submitted Date	Paid Date	Claim Amount
1011 - 001	Reimbursement	Paid			Oct 8, 2024 8:23 AM	10/08/2024	\$107,000.00
1011 - 002	Reimbursement	Withdrawn	02/01/2025	02/28/2025			-
1011 - 003	Reimbursement	Withdrawn					-
1011 - 004	Payment	Withdrawn					-
1011 - 005	Reimbursement	Withdrawn					-
1011 - 006	Reimbursement	Withdrawn	02/01/2025	04/30/2025			-
1011 - 007	Advance Payment Request	Editing	05/01/2025	02/28/2026			\$0.00
1011 - 008	Reimbursement	Withdrawn					-
1011 - 009	Reimbursement	Editing					\$0.00

The screenshot shows the 'Claim Details' form for claim 1011. At the top, there are tabs: 'Claim Preview', 'Attachments', 'Alert History', and 'Map'. Below the tabs, there's a header bar with a 'Withdraw' button (orange) and an 'Edit Claim' button (green). A red arrow points to the 'Edit Claim' button. Below the header, the claim title '1011 - Evan's Test App - KEEP - 2024' is displayed, followed by a 'Claim Details' link.

Reimbursement Request

1. **There are four forms that need to be completed before you can submit a reimbursement request.** Once you have completed a form, it will show a green check mark (✓) in the middle column (“Complete?”) of the component list (for example, see General Information above). ***Note: You will only be able to submit a reimbursement request once all forms are marked as “complete”.***
 - a. [General Information](#) – This form is completed when you create a claim (see steps 4-10 in the “Getting Started” section above).
 - b. [Detail of Expenditure](#) – This form is where you enter the expenditures associated with the reimbursement request.
 - c. [Reimbursement Request](#) – This form requires you to enter some basic information, including a summary of how each expense supports the project scope of work.
 - d. [Claim Supporting Documentation](#) – This is where you will attach all documentation associated with the reimbursement request. *Note: See the [Claims 101 document](#) for supporting documentation requirements.*

[Claim Preview](#) [Attachments](#) [Alert History](#) [Map](#)

 **Claim Details**

[Withdraw](#) [Preview Claim](#)

Claim cannot be Submitted Currently

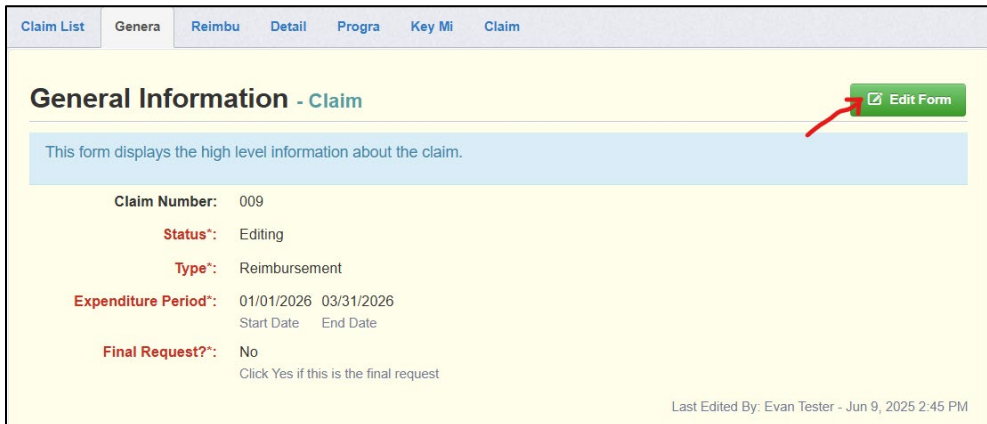
- Claim components are not complete

Component	Complete?	Last Edited
General Information	✓	Dec 12, 2025 11:38 AM - Evan Elderbrock
Detail of Expenditure	-	-
Reimbursement Request	-	Dec 15, 2025 10:23 AM - Evan Tester
Claim Supporting Documentation	-	-

2. **You can update the Expenditure Period and Final Request status by clicking on the [General Information](#) form in the component list and then clicking on the “Edit Form” button.**

Component	Complete?	Last Edited
General Information	✓	Dec 12, 2025 11:38 AM - Evan Elderbrock
Detail of Expenditure	-	-

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Claim List Genera **Reimbu** Detail Progra Key Mi Claim

General Information - Claim

☒ Edit Form

This form displays the high level information about the claim.

Claim Number: 009

Status*: Editing

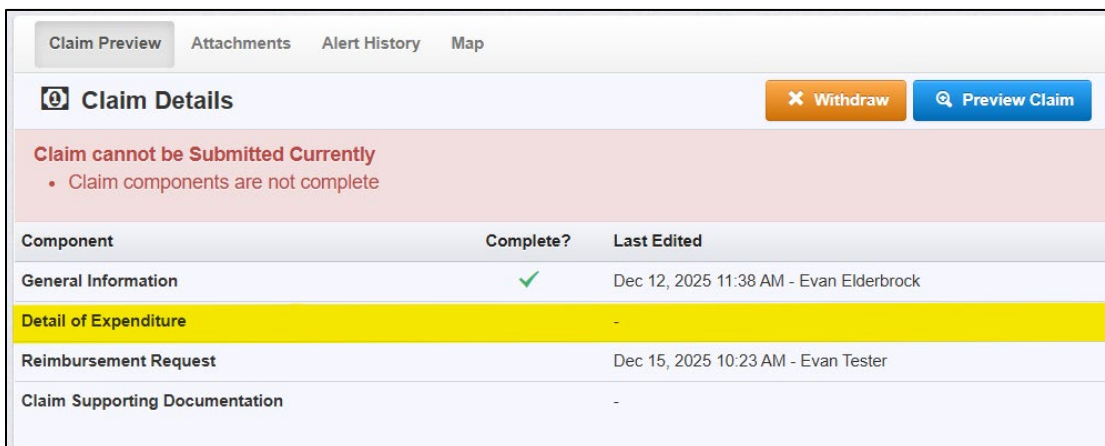
Type*: Reimbursement

Expenditure Period*: 01/01/2026 03/31/2026
Start Date End Date

Final Request?*: No
Click Yes if this is the final request

Last Edited By: Evan Tester - Jun 9, 2025 2:45 PM

3. Click on the **Details of Expenditure** form in the grant component list.



Claim Preview Attachments Alert History Map

Claim Details

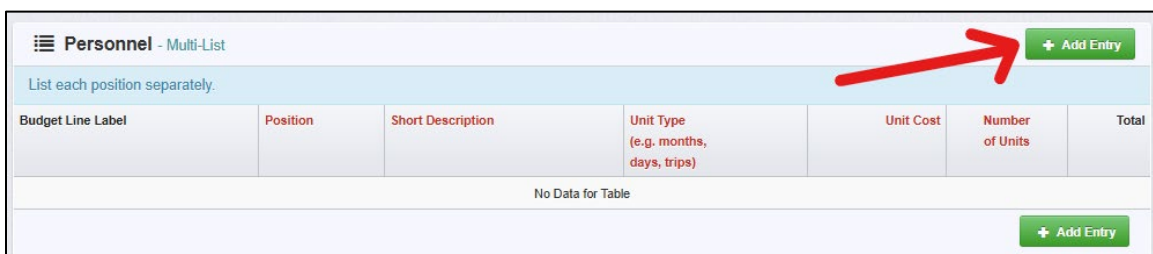
☒ Withdraw ☒ Preview Claim

Claim cannot be Submitted Currently

- Claim components are not complete

Component	Complete?	Last Edited
General Information	✓	Dec 12, 2025 11:38 AM - Evan Elderbrock
Detail of Expenditure	-	-
Reimbursement Request		Dec 15, 2025 10:23 AM - Evan Tester
Claim Supporting Documentation		-

4. Click the “Add Entry” button in the budget category to add an itemized expense.



☒ Personnel - Multi-List

List each position separately.

Budget Line Label	Position	Short Description	Unit Type (e.g. months, days, trips)	Unit Cost	Number of Units	Total
No Data for Table						

☒ Add Entry

5. Enter the required information for the line item and click “Save Row”. Note: You are limited to entering expenses for line items from your budget (select from the “Budget Line” drop-down menu. If you have expenses that are not associated with existing line items, you will need to submit an amendment/modification request (see [amendment/modification request tutorial](#)).

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Personnel

Save Row

List each position separately.

Budget Line Label:

Budget Line*:

Personnel-person

Position*:

UCF staff person

Short Description*:

salary for January through March for UCF s
104 character(s) left

Unit Type
(e.g. months,
days, trips)*:

days (8 hrs per day)

Unit Cost*:

\$320

Number
of Units*:

61

Personnel - Multi-List							✓ Mark as Complete	+ Add Entry
List each position separately.								
Budget Line Label	Position	Short Description	Unit Type (e.g. months, days, trips)	Unit Cost	Number of Units	Total		
Personnel-person	UCF staff person	salary for January through March for UCF staff	days (8 hrs per day)	\$320.00	61.00	\$19,520.00		
						\$19,520.00		
						\$19,520.00		
Last Edited By: Evan Tester - Jun 9, 2025 3:42 PM							+ Add Entry	

6. After you have entered all direct cost budget categories, scroll down to the indirect cost category, click the “Add Entry” button, and enter the indirect cost rate approved for this subaward. The indirect costs will automatically be updated based on this rate and the eligible direct costs. *Note: if you change the direct costs after you have entered the indirect costs, you need to update the indirect costs, by clicking on the entry and re-saving it.*

Indirect Costs - Multi-List

+ Add Entry

Use “de minimis” rate (10%) or an approved negotiated indirect cost rate agreement (NICRA).

Budget Line Label	Indirect Rate	Expense Total
No Data for Table		

+ Add Entry

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Indirect Costs

Use "de minimis" rate (10%) or an approved negotiated indirect cost rate agreement (NICRA).

Budget Line Label:

Budget Line*: Indirect Costs-Awarded Amount

Indirect Rate*: 10%

Expense Total:

Save Row

7. If you have a negotiated indirect cost rate agreement (NICRA) that has changed, click the “Add New Attachment” to the “NICRA (if applicable)” section, upload the updated NICRA, and click the “Save File” button.

Indirect Costs - Multi-List

Use "de minimis" rate (10%) or an approved negotiated indirect cost rate agreement (NICRA).

Budget Line Label	Indirect Rate	Total
Indirect Costs-Awarded Amount	10.00	\$3,000.00

Last Edited By: Evan Tester - Jun 9, 2025 4:53 PM

NICRA (if applicable) - Other Attachments

Attach your negotiated indirect cost rate agreement (NICRA) here if approved NICRA has changed.

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

Last Edited By: Evan Tester - Jun 9, 2025 4:53 PM

Attach File

Upload File*: Select file


Description*:

500 character(s) left


Save File Cancel

8. After you have entered all line items that you are seeking reimbursement for, navigate to “Claim Summary” at the bottom of the page to see an overview of the budget with the following columns:
- Grant Budget Awarded – The total amount awarded within each budget category. *Note: The software will not allow you to request more than the Grant Budget Awarded. Contact UCF staff to discuss making budget adjustments.*
 - Expensed This Period – The total amount expensed for each budget category in this request.

- c. Prior Expenses (Paid) – The total amount paid before this request for each budget category, either through reimbursement or advance payment.
- d. Total – The combined total of “Prior Expenses (Paid)” and “Expenses This Period” columns.
- e. Available Balance (Unpaid) – The difference between the “Grant Budget Awarded” and the “Total” columns.
- f. Prior Expenses (Submitted Not Paid) – Total of previously submitted payment requests that have yet to be paid.
- g. Total Claimed – The combined total of “Expenses This Period”, “Prior Expenses (Paid)”, and “Prior Expenses (Submitted Not Paid)” columns.
- h. Remaining Balance (Unclaimed) – The difference between the “Grant Budget Awarded” and “Total Claimed” columns.

<div>  Claim Summary <div>✓ Mark as Complete</div> </div>								
Budget Category	Grant Budget Awarded	Expenses This Period	Prior Expenses (Paid)	Total	Available Balance (Unpaid)	Prior Expenses (Submitted Not Paid)	Total Claimed	Remaining Balance (Unclaimed)
Indirect Costs								
Awarded Amount	\$29,390.00	\$3,000.00	\$25,000.00	\$28,000.00	\$1,390.00	\$0.00	\$28,000.00	\$1,390.00
	\$29,390.00	\$3,000.00	\$25,000.00	\$28,000.00	\$1,390.00	\$0.00	\$28,000.00	\$1,390.00
Personnel								
person	\$30,000.00	\$19,520.00	\$0.00	\$19,520.00	\$10,480.00	\$0.00	\$19,520.00	\$10,480.00
	\$30,000.00	\$19,520.00	\$0.00	\$19,520.00	\$10,480.00	\$0.00	\$19,520.00	\$10,480.00

9. Click the “Mark as Complete” button (see above) which will bring you back to the grant components list.

<div>  Claim Summary <div>✓ Mark as Complete</div> </div>								
Budget Category	Grant Budget Awarded	Expenses This Period	Prior Expenses (Paid)	Total	Available Balance (Unpaid)	Prior Expenses (Submitted Not Paid)	Total Claimed	Remaining Balance (Unclaimed)
Indirect Costs								

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10. Click on the Reimbursement Request form in the grant component list.

The screenshot shows the 'Claim Details' page with tabs for 'Claim Preview', 'Attachments', 'Alert History', and 'Map'. A red banner at the top states 'Claim cannot be Submitted Currently' with a bullet point 'Claim components are not complete'. Below this is a table with three columns: 'Component', 'Complete?', and 'Last Edited'.

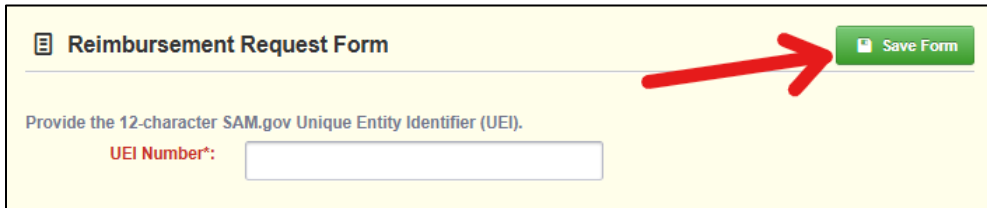
Component	Complete?	Last Edited
General Information	✓	Dec 12, 2025 11:38 AM - Evan Elderbrock
Detail of Expenditure	✓	Dec 16, 2025 8:26 AM - Evan Tester
Reimbursement Request		Dec 15, 2025 10:23 AM - Evan Tester
Claim Supporting Documentation	-	

11. Complete the form by 1) entering your SAM.gov Unique Entity Identifier (UEI), 2) attaching a screenshot of your active UEI status (see [SAM.gov status tutorial](#)), 3) summarizing how each expense listed in the Details of Expenditure form contributed to the project scope of work, 4) describing and financial or administrative issues that could impact project spending, and 5) certifying that the information provided is true, complete, and accurate.

The screenshot shows the 'Reimbursement Request Form' with a 'Save Form' button in the top right. The form contains the following sections:

- UEI Number*:** A text input field for the 12-character SAM.gov Unique Entity Identifier (UEI).
- UEI Verification*:** A text input field for attaching a SAM.gov screenshot to verify active UEI status, with a 'Select file' button.
- Summary of Expenditures*:** A large text area for summarizing how each expense contributed to achieving project activities and outcomes. A note states: 'To approve any claim, the UCF Program needs to be able to connect each expenditure with the scope of work outlined in the subaward agreement.' The character count is 5000.
- Financial and/or Administrative Issues:** A text area for describing any financial or administrative issues that could impact project spending. The character count is 3000.
- Certification*:** A dropdown menu for certifying that the information provided is true, complete, and accurate. A disclaimer text is provided: 'I certify to the best of my knowledge and belief that the information provided herein is true, complete, and accurate. I am aware that the provision of false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil, or administrative consequences including, but not limited to violations of U.S. Code Title 18, Sections 2, 1001, 1343 and Title 31, Sections 3729-3730 and 3801-3812.'

12. Once you have completed the form, click the “Save Form” button and then, click the “Mark as Complete” button.

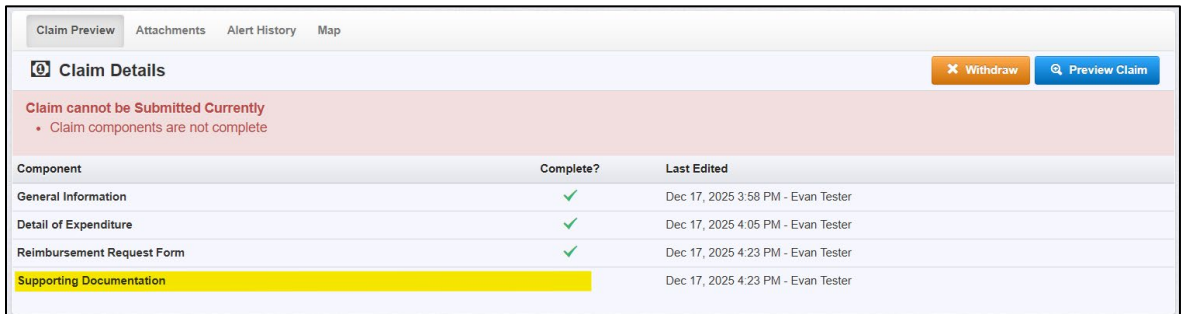


The screenshot shows the 'Reimbursement Request Form' interface. At the top, there is a header with a document icon and the title 'Reimbursement Request Form'. Below the header, there is a text input field labeled 'UEI Number*:' with a red asterisk. To the right of the input field, there is a green button labeled 'Save Form' with a document icon. A red arrow points to the 'Save Form' button.



The screenshot shows the 'Reimbursement Request Form' interface. At the top, there is a header with a document icon and the title 'Reimbursement Request Form'. Below the header, there is a text input field labeled 'UEI Number*:' with a red asterisk. To the right of the input field, there are two buttons: an orange button labeled 'Mark as Complete' with a checkmark icon, and a green button labeled 'Edit Form' with a pencil icon. A red arrow points to the 'Mark as Complete' button.

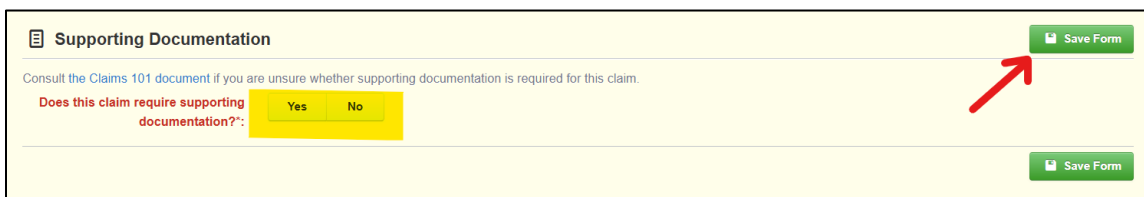
13. Click on the “**Supporting Documentation**” form. *Note: To ensure proper reimbursement and tracking of grant funds, it is important to submit claims with proper documentation (see the [Claims 101 document](#) for supporting documentation requirements).*



The screenshot shows the 'Claim Details' page. At the top, there is a navigation bar with tabs: 'Claim Preview', 'Attachments', 'Alert History', and 'Map'. Below the navigation bar, there is a header with a document icon and the title 'Claim Details'. To the right of the header, there are two buttons: an orange button labeled 'Withdraw' and a blue button labeled 'Preview Claim'. Below the header, there is a red banner with the text 'Claim cannot be Submitted Currently' and a sub-message 'Claim components are not complete'. Below the banner, there is a table with the following columns: 'Component', 'Complete?', and 'Last Edited'.

Component	Complete?	Last Edited
General Information	✓	Dec 17, 2025 3:58 PM - Evan Tester
Detail of Expenditure	✓	Dec 17, 2025 4:05 PM - Evan Tester
Reimbursement Request Form	✓	Dec 17, 2025 4:23 PM - Evan Tester
Supporting Documentation		Dec 17, 2025 4:23 PM - Evan Tester

14. If supporting documentation is not required for this claim, click “No” in response to the question, “Does this claim require supporting documentation?”, then click and “Save Form”. If support documentation is required, click “Yes” to the question and click “Save Form”. Supporting documentation is required for certain budget categories. Consult [the Claims 101 document](#) if you are unsure whether supporting documentation is required for this claim.



The screenshot shows the 'Supporting Documentation' form. At the top, there is a header with a document icon and the title 'Supporting Documentation'. Below the header, there is a text input field labeled 'Does this claim require supporting documentation?:' with a red asterisk. To the right of the input field, there are two buttons: a yellow button labeled 'Yes' and a yellow button labeled 'No'. To the right of the 'Yes' and 'No' buttons, there is a green button labeled 'Save Form' with a document icon. A red arrow points to the 'Save Form' button.

15. If you clicked “Yes”, you will see a “Supporting Documentation” table appear. For each document you would like to upload, click the “Add New Attachment” button, upload the appropriate file, write a description of the attachment, and click the “Save File” Button.

Please attach any claim supporting documents.

Supporting Documentation - Other Attachments

✓ Mark as Complete + Add New Attachment

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

Last Edited By: Evan Tester - Jun 9, 2025 5:55 PM

Attach File

Upload File*: Select file

Description*:

500 character(s) left

Save File Cancel

16. Once all attachments are uploaded, click the “Mark as Complete” button.

Please attach any claim supporting documents.

Supporting Documentation - Other Attachments

✓ Mark as Complete + Add New Attachment

Description	File Name	Type	Size	Upload Date	Delete
blah	Logo in Gray.jpg	jpg	803 KB	09/09/2025 05:58 PM	Delete

Last Edited By: Evan Tester - Jun 9, 2025 5:58 PM

17. When all four components have been marked complete, you will notice a green section above the grant components lists that says, “Claim is in compliance...”. Click the “Submit Claim” button. You will be asked to confirm that you would like to submit the claim. If you are ready, click the “Submit” button.

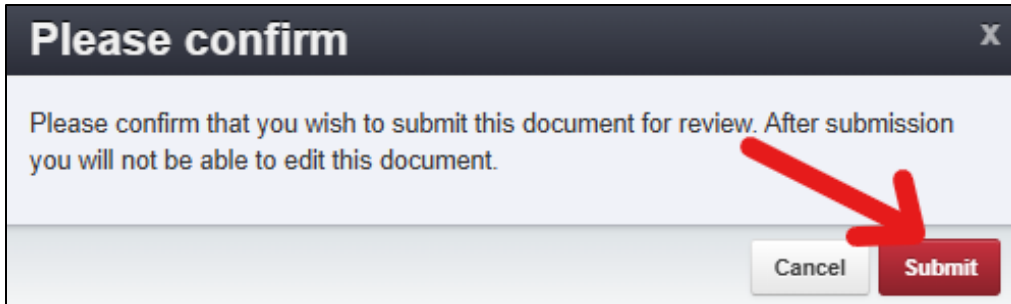
Claim Preview Attachments Alert History Map

Claim Details

✓ Submit Claim ✗ Withdraw Preview Claim

• Claim is in compliance and is ready for Submission!

Component	Complete?	Last Edited
General Information	✓	Dec 12, 2025 11:38 AM - Evan Elderbrock
Detail of Expenditure	✓	Dec 16, 2025 8:26 AM - Evan Tester
Reimbursement Request	✓	Dec 16, 2025 8:39 AM - Evan Tester
Claim Supporting Documentation	✓	Dec 16, 2025 8:41 AM - Evan Tester




Advance Payment Request

1. **There are four forms that need to be completed before you can submit an advance payment request.** Once you have completed a form, it will show a green check mark (✓) in the middle column (“Complete?”) of the component list (for example, see General Information above). *Note: You will only be able to submit an advance payment request once all forms are marked as “complete”.*
 - a. [General Information](#) – This form is completed when you create a claim (see steps 4-10 in the “Getting Started” section above).
 - b. [Detail of Expenditure](#) – This form is where you enter the expenditures associated with the advance payment request.
 - c. [Advance Payment Request](#) – This form requires you to enter some information, including why an advance payment is necessary, if you have funds from previous advance payments remaining, and a summary of expenditures for this advance payment.
 - a. [Supporting Documentation \(Advance Payment Request\)](#) – This is where you will attach all documentation associated with the advance payment request. This is optional for the advance payment request but will be required at the time of advance payment verification.

Claim Preview Attachments Alert History Map		
Claim Details Withdraw Preview Claim		
Claim cannot be Submitted Currently <ul style="list-style-type: none">Claim components are not complete		
Component	Complete?	Last Edited
General Information	✓	Aug 27, 2025 1:25 PM - Evan Tester
Detail of Expenditure	-	
Advance Payment Request		Aug 27, 2025 1:25 PM - Evan Tester
Supporting Documentation (Advance Payment Request)	-	

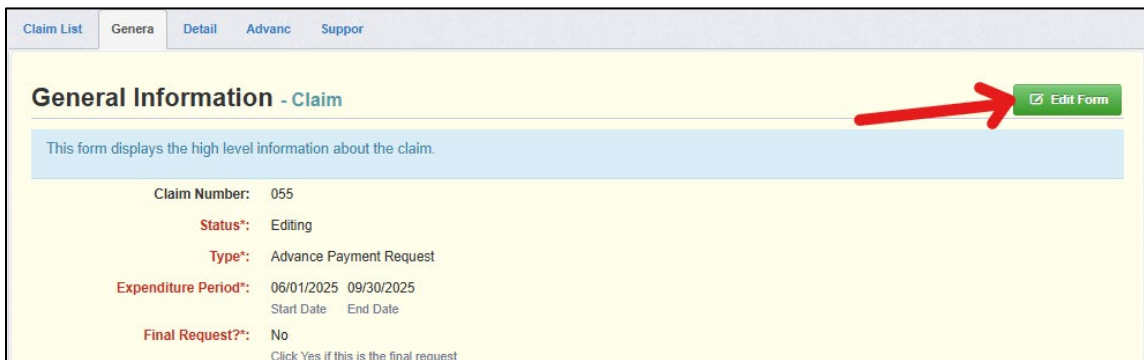
[\[Back to Top\]](#)

2. You can update the Expenditure Period and Final Request status by clicking on the **General Information** form in the component list and then clicking on the **“Edit Form”** button.



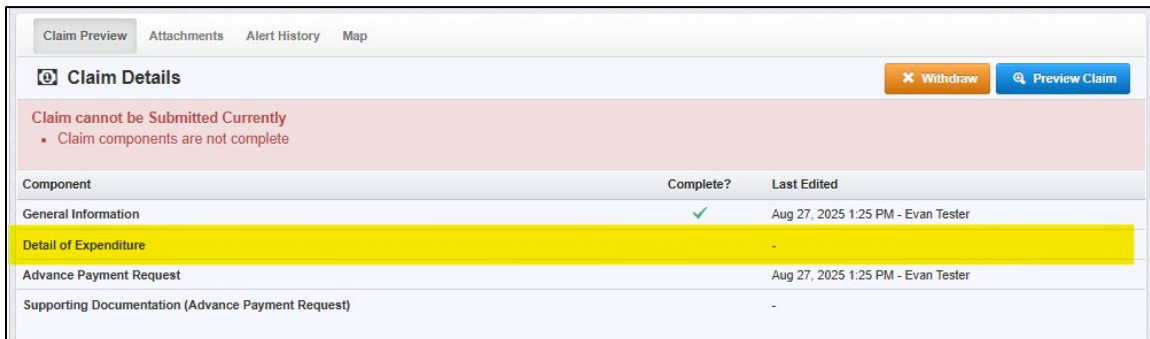
The screenshot shows the 'Claim Details' page with tabs for Claim Preview, Attachments, Alert History, and Map. A red banner at the top states 'Claim cannot be Submitted Currently' with a sub-message 'Claim components are not complete'. Below this is a table with columns 'Component', 'Complete?', and 'Last Edited'. The 'General Information' row is highlighted in yellow, showing a green checkmark in the 'Complete?' column and the text 'Aug 27, 2025 1:25 PM - Evan Tester' in the 'Last Edited' column. The 'Detail of Expenditure' row is also highlighted in yellow and shows a dash in the 'Last Edited' column. Buttons for 'Withdraw' and 'Preview Claim' are in the top right.

Component	Complete?	Last Edited
General Information	✓	Aug 27, 2025 1:25 PM - Evan Tester
Detail of Expenditure	-	-



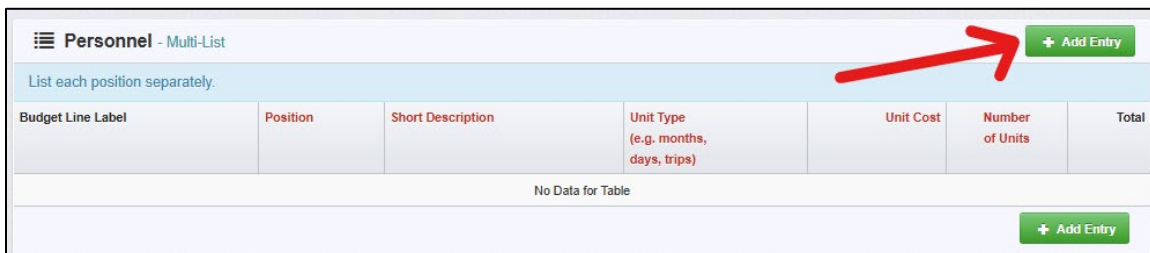
The screenshot shows the 'General Information - Claim' form. A red arrow points to the 'Edit Form' button in the top right corner. The form contains the following information: Claim Number: 055, Status*: Editing, Type*: Advance Payment Request, Expenditure Period*: 06/01/2025 09/30/2025 (with Start Date and End Date labels), and Final Request?*: No (with a link 'Click Yes if this is the final request').

3. Click on the **Details of Expenditure** form in the grant component list.



This screenshot is similar to the first one, showing the 'Claim Details' page. The 'Detail of Expenditure' row in the component table is highlighted in yellow. Below the table, there are sections for 'Advance Payment Request' and 'Supporting Documentation (Advance Payment Request)', both showing a dash in the 'Last Edited' column.

4. Click the **“Add Entry”** button in the budget category to add an itemized expense.



The screenshot shows the 'Personnel - Multi-List' form. A red arrow points to the 'Add Entry' button in the top right corner. Below the button is a table with columns: Budget Line Label, Position, Short Description, Unit Type (e.g. months, days, trips), Unit Cost, Number of Units, and Total. The table is currently empty, with a message 'No Data for Table' at the bottom. Another 'Add Entry' button is located at the bottom right of the table.

5. **Enter the required information for the line item and click “Save Row”.** *Note: You are limited to entering expenses for line items from your budget (select from the “Budget Line” drop-down menu. If you have expenses that are not associated with existing line items, you will need to work with UCF Program staff to update your budget prior to submitting a claim.*

Personnel

Save Row

List each position separately.

Budget Line Label:

Budget Line*:

Personnel-person

Position*:

UCF staff person

Short Description*:

salary for January through March for UCF s

104 character(s) left

Unit Type (e.g. months, days, trips)*:

days (8 hrs per day)

Unit Cost*:

\$320

Number of Units*:

61

Personnel - Multi-List

Mark as Complete

Add Entry

List each position separately.

Budget Line Label	Position	Short Description	Unit Type (e.g. months, days, trips)	Unit Cost	Number of Units	Total
Personnel-person	UCF staff person	salary for January through March for UCF staff	days (8 hrs per day)	\$320.00	61.00	\$19,520.00
						\$19,520.00
						\$19,520.00

Last Edited By: Evan Tester - Jun 9, 2025 3:42 PM

Add Entry

6. **After you have entered all direct cost budget categories, scroll down to the indirect cost category, click the “Add Entry” button, and enter the indirect cost rate approved for this subaward. The indirect costs will automatically be updated based on this rate and the eligible direct costs.** *Note: If you change the direct costs after you have entered the indirect costs, you need to update the indirect costs, by clicking on the entry and re-saving it.*

Indirect Costs - Multi-List

Add Entry

Use “de minimis” rate (10%) or an approved negotiated indirect cost rate agreement (NICRA).

Budget Line Label	Indirect Rate	Expense Total
No Data for Table		

Add Entry

[\[Back to Top\]](#)

Indirect Costs

Use "de minimis" rate (10%) or an approved negotiated indirect cost rate agreement (NICRA).

Budget Line Label:

Budget Line*: Indirect Costs-Awarded Amount

Indirect Rate*:

Expense Total:

[Save Row](#)

7. If you have a negotiated indirect cost rate agreement (NICRA) that has changed, click the “Add New Attachment” to the “NICRA (if applicable)” section, upload the updated NICRA, and click the “Save File” button.

Indirect Costs - Multi-List

[✓ Mark as Complete](#) [+ Add Entry](#)

Use "de minimis" rate (10%) or an approved negotiated indirect cost rate agreement (NICRA).

Budget Line Label	Indirect Rate	Total
Indirect Costs-Awarded Amount	10.00	\$3,000.00

Last Edited By: Evan Tester - Jun 9, 2025 4:53 PM [+ Add Entry](#)

NICRA (if applicable) - Other Attachments

[✓ Mark as Complete](#) [+ Add New Attachment](#)

Attach your negotiated indirect cost rate agreement (NICRA) here if approved NICRA has changed.

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

Last Edited By: Evan Tester - Jun 9, 2025 4:53 PM

Attach File

[✓ Mark as Complete](#) [X Cancel](#)

Upload File*: [Select file](#)

Description*:

500 character(s) left

8. After you have entered all line items that you are seeking advance payment for, navigate to “Claim Summary” at the bottom of the page to see an overview of the budget (see [Reimbursement Claim Summary](#) for column descriptions).

Claim Summary								
✓ Mark as Complete								
Budget Category	Grant Budget Awarded	Expenses This Period	Prior Expenses (Paid)	Total	Available Balance (Unpaid)	Prior Expenses (Submitted Not Paid)	Total Claimed	Remaining Balance (Unclaimed)
Indirect Costs								
Awarded Amount	\$29,390.00	\$3,000.00	\$25,000.00	\$28,000.00	\$1,390.00	\$0.00	\$28,000.00	\$1,390.00
	\$29,390.00	\$3,000.00	\$25,000.00	\$28,000.00	\$1,390.00	\$0.00	\$28,000.00	\$1,390.00
Personnel								
person	\$30,000.00	\$19,520.00	\$0.00	\$19,520.00	\$10,480.00	\$0.00	\$19,520.00	\$10,480.00
	\$30,000.00	\$19,520.00	\$0.00	\$19,520.00	\$10,480.00	\$0.00	\$19,520.00	\$10,480.00

9. Click the “Mark as Complete” button (see above) which will bring you back to the grant components list.



10. Click on the Advance Payment Request form in the grant component list.

A screenshot of the 'Claim Details' form. The form has tabs for 'Claim Preview', 'Attachments', 'Alert History', and 'Map'. Below the tabs, there is a 'Claim Details' section with a 'Withdraw' button and a 'Preview Claim' button. A red banner indicates 'Claim cannot be Submitted Currently' with the subtext 'Claim components are not complete'. Below this, there is a table with columns 'Component', 'Complete?', and 'Last Edited'. The table lists 'General Information', 'Detail of Expenditure', 'Advance Payment Request' (highlighted in yellow), and 'Supporting Documentation (Advance Payment Request)'. The 'Advance Payment Request' row shows 'Complete?' as a green checkmark and 'Last Edited' as 'Aug 27, 2025 1:25 PM - Evan Tester'.

11. Complete the “Advance Payment Request” form.

- Enter your SAM.gov Unique Entity Identifier (UEI) and a screenshot of your active UEI status (see [SAM.gov status tutorial](#)).
- Certify that advance payment is needed to fund the project’s operation.
- Clearly describe why advance payment is necessary and provide a timeline for completing the work funded through this advance.
- Check whether you have made previous advance payment requests. If funds have not been completely liquidated, explain why and provide a spending timeline for the outstanding funds.
- Provide a summary of how each expense listed in the Details of Expenditure form contribute to project scope of work.
- Certify that 1) you are following the outline advance payment process, 2) all funds received through advance payment will be fully liquidated within 90 days of receipt of funds, 3) advance payment requests will be made in a timely manner, and 4) the information provided is true, complete, and accurate.

[\[Back to Top\]](#)

Advance Payment Conditions Save Form

Provide the 12-character SAM.gov Unique Entity Identifier (UEI).

UEI Number*:

Attach SAM.gov screenshot to verify active UEI status file.

Verification*: Select file

The subrecipient certifies that advance payment is needed to fund this project's operations.

Needed*:

Clearly describe why this advance payment is necessary and the timeline for completing the work funded with this advance.

Necessity and Timeline*:

5000 character(s) left

Have you made previous advance payment request?

Previous Advance Payment Request*:

If funds from previous advance payment requests have not been completely liquidated, clearly explain why funds have not yet been spent and describe the spending timeline and plan for completing the remaining work funded from the previous advance.

Previous Advance Description:

5000 character(s) left

Summarize how each expense listed in the Details of Expenditure form will contribute to achieving the project activities and outcomes. *Note: To approve any claim, the UCF Program needs to be able to connect each expenditure with the scope of work outlined in the subaward agreement.*

Summary of Expenditures*:

5000 character(s) left

Advance payment requests must be submitted in accordance with the advance payment request process negotiated with ODF.

Submission*:

All funds received through advance payment must be fully liquidated within 90 days of receipt of funds.

Liquidation*:

The subrecipient is responsible for requesting advance funds in a timely manner to support the operational budget of this proposal.

Timely Manner*:

I certify to the best of my knowledge and belief that the information provided herein is true, complete, and accurate. I am aware that the provision of false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil, or administrative consequences including, but not limited to violations of U.S. Code Title 18, Sections 2, 1001, 1343 and Title 31, Sections 3729-3730 and 3801-3812.

Certification*:

Save Form

12. Once you have completed the form, click the “Save Form” button and then, click the “Mark as Complete” button.



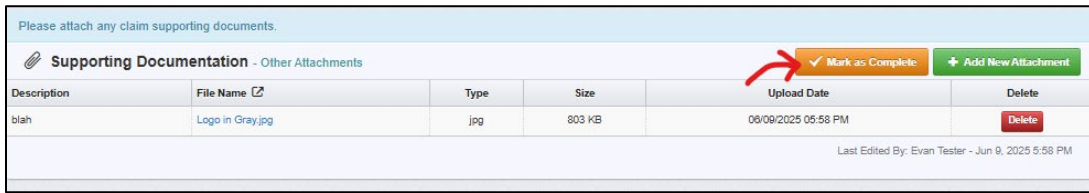
18. Click on the “Supporting Documentation” form. *Note: To ensure proper reimbursement and tracking of grant funds, it is important to submit claims with proper documentation (see the [Claims 101 document](#) for supporting documentation requirements).*

Component	Complete?	Last Edited
General Information	✓	Aug 27, 2025 1:25 PM - Evan Tester
Detail of Expenditure	✓	Dec 16, 2025 8:55 AM - Evan Tester
Advance Payment Request	✓	Dec 16, 2025 11:13 AM - Evan Tester
Supporting Documentation (Advance Payment Request)		

19. If supporting documentation is not required for this claim, click “No” in response to the question, “Does this claim require supporting documentation?”, then click and “Save Form”. If support documentation is required, click “Yes” to the question and click “Save Form”. Supporting documentation is required for certain budget categories. Consult [the Claims 101 document](#) if you are unsure whether supporting documentation is required for this claim.

20. If you clicked “Yes”, you will see a “Supporting Documentation” table appear. For each document you would like to upload, click the “Add New Attachment” button, upload the appropriate file, write a description of the attachment, and click the “Save File” Button.

16. Once all attachments are uploaded, click the “Mark as Complete” button.



Please attach any claim supporting documents.

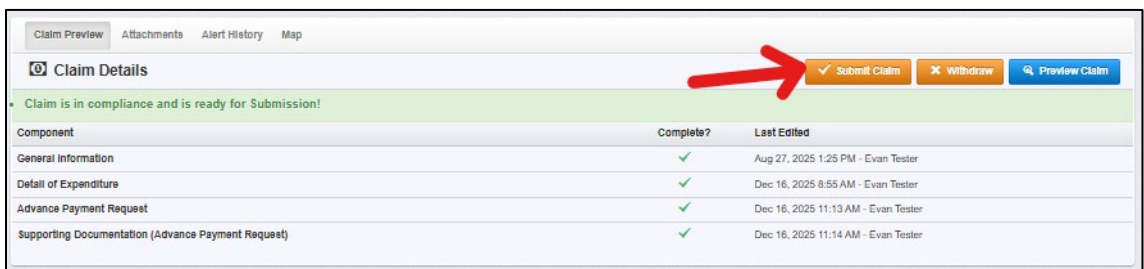
Supporting Documentation - Other Attachments

Mark as Complete Add New Attachment

Description	File Name	Type	Size	Upload Date	Delete
blah	Logo in Gray.jpg	jpg	803 KB	09/09/2025 05:58 PM	Delete

Last Edited By: Evan Tester - Jun 9, 2025 5:58 PM

17. When all four components have been marked complete, you will notice a green section above the grant components lists that says, “Claim is in compliance...”. Click the “Submit Claim” button. You will be asked to confirm that you would like to submit the claim. If you are ready, click the “Submit” button.



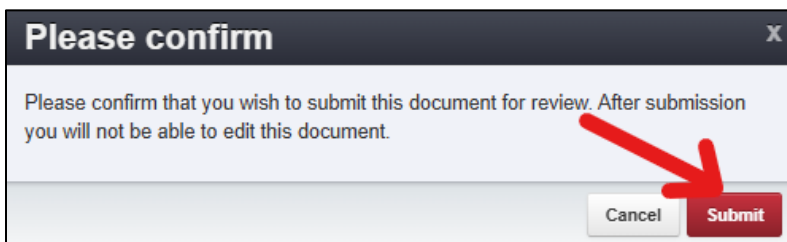
Claim Preview Attachments Alert History Map

Claim Details

Submit Claim Withdraw Preview Claim

Claim is in compliance and is ready for Submission!

Component	Complete?	Last Edited
General Information	✓	Aug 27, 2025 1:25 PM - Evan Tester
Detail of Expenditure	✓	Dec 16, 2025 8:55 AM - Evan Tester
Advance Payment Request	✓	Dec 16, 2025 11:13 AM - Evan Tester
Supporting Documentation (Advance Payment Request)	✓	Dec 16, 2025 11:14 AM - Evan Tester



Please confirm

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

Cancel Submit

Advance Payment Verification

- 1. There are three forms that need to be completed before you can submit an advance payment verification.** Once you have completed a form, it will show a green check mark (✓) in the middle column (“Complete?”) of the component list (for example, see General Information above). You will only be able to submit a reimbursement request once all forms are marked as “complete”.
 - a. [General Information](#) – This form is completed when you create a claim (see steps 4-10 in the “Getting Started” section above).
 - b. [Advance Payment Verification](#) – This form requires you to enter some basic information (e.g., award number, Unique Entity Identifier, etc).

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- c. [Claim Supporting Documentation](#) – This is where you will attach all documentation associated with the advance payment verification. *Note: See the [Claims 101 document](#) for supporting documentation requirements.*



Claim Preview Attachments Alert History Map

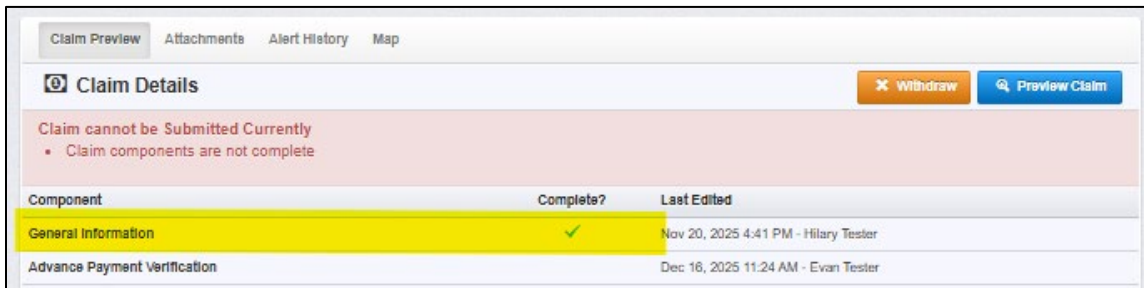
Claim Details [Withdraw](#) [Preview Claim](#)

Claim cannot be Submitted Currently

- Claim components are not complete

Component	Complete?	Last Edited
General Information	✓	Nov 20, 2025 4:41 PM - Hilary Tester
Advance Payment Verification		Dec 15, 2025 10:23 AM - Evan Tester
Claim Supporting Documentation		Nov 20, 2025 4:44 PM - Hilary Tester

2. You can update the Expenditure Period and Final Request status by clicking on the **General Information** form in the component list and then clicking on the “Edit Form” button.



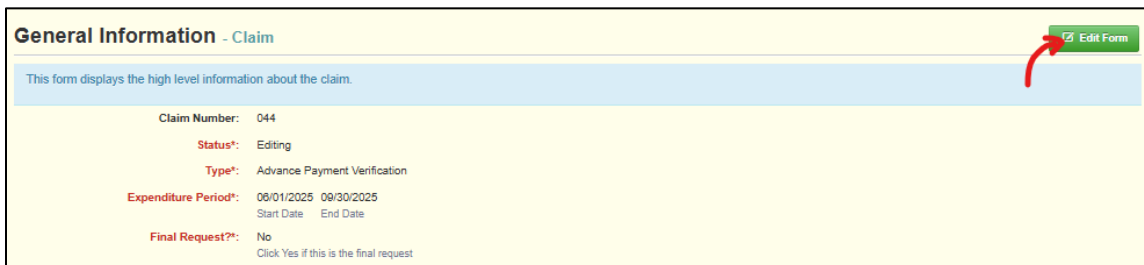
Claim Preview Attachments Alert History Map

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

Claim cannot be Submitted Currently

- Claim components are not complete

Component	Complete?	Last Edited
General Information	✓	Nov 20, 2025 4:41 PM - Hilary Tester
Advance Payment Verification		Dec 16, 2025 11:24 AM - Evan Tester



General Information - Claim [Edit Form](#)

This form displays the high level information about the claim.

Claim Number: 044

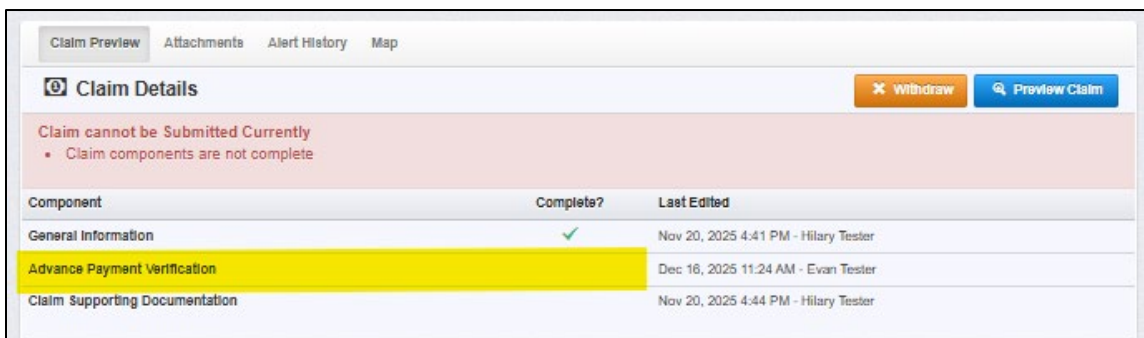
Status*: Editing

Type*: Advance Payment Verification

Expenditure Period*: 09/01/2025 09/30/2025
Start Date End Date

Final Request?: No
Click Yes if this is the final request

3. Click on the “**Advance Payment Verification**” form in the grant component list.



Claim Preview Attachments Alert History Map

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

Claim cannot be Submitted Currently

- Claim components are not complete

Component	Complete?	Last Edited
General Information	✓	Nov 20, 2025 4:41 PM - Hilary Tester
Advance Payment Verification		Dec 16, 2025 11:24 AM - Evan Tester
Claim Supporting Documentation		Nov 20, 2025 4:44 PM - Hilary Tester

5. Complete the “Advance Payment Verification” form.

- a. Enter your SAM.gov Unique Entity Identifier (UEI) and a screenshot of your active UEI status (see [SAM.gov status tutorial](#)).
- b. Select whether (or not) all advance payment funds have been spent. If all the funds have not been spent, clearly explain why and describe the timeline for spending the remaining funds.
- c. Select whether (or not) all expenditures were identical to the projected costs in the Advance Payment Request and explain any changes.
- d. Certify that advance payment verification is submitted in accordance with the advance payment schedule provided by ODF.
- e. Certify that the information provided is true, complete, and accurate.

Advance Verification

Save Form

Provide the 12-character SAM.gov Unique Entity Identifier (UEI).

UEI Number*:

Please provide a PDF or screenshot of the UEI status.

Provide a PDF or screenshot of the UEI status*:

Select fileRemove

Logo in Gray_thumb.jpg

Have all the funds provided in the advance payment been spent?

Advance Payment: Spending Completed*:

YesNo

If not all advance payment funds from this request have been spent, clearly explain why funds have not yet been spent and describe the timeline for completing the remaining work funded with this advance.

Unspent Funds (if applicable):

\$1000 not spent in supplies, new tariffs make this not feasible
\$5000 not spent in contractual, shift in organizational priorities rerouted contractor to complete their anticipate work on xxx activity until mm/dd/yyyy.

Requesting to reallocate supplies \$1000 to other costs, so we can stipend one intern to support contractor work. This specific activity will be done by mm/dd/yyyy. Anticipate having documentation

4555 character(s) left

Were the projected costs in the Advance Payment Request (see Details of Expenditure) identical to the actual costs?

Advance Payment: Projected versus Actuals*:

YesNo

Describe in detail any changes between the projected spending in the Advance Payment Request (see Details of Expenditure form) and actual spending.

Expenditure Changes from Advance Payment Request (if applicable):

5000 character(s) left

Advance payment verification must be submitted in accordance with the advance payment schedule provided by ODF.

Advance Payment Schedule*:

I have read and acknowledged this statement to be true. ▼

I certify to the best of my knowledge and belief that the information provided herein is true, complete, and accurate. I am aware that the provision of false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil, or administrative consequences including, but not limited to violations of U.S. Code Title 18, Sections 2, 1001, 1343 and Title 31, Sections 3729-3730 and 3801-3812.

Certification*:

I have read and acknowledged this statement to be true. ▼

Save Form

6. Once you have completed the form, click the “Save Form” button and then, click the “Mark as Complete” button.



7. Click on the “Supporting Documentation” form. *Note: To ensure proper reimbursement and tracking of grant funds, it is important to submit claims with proper documentation (see the [Claims 101 document](#) for supporting documentation requirements).*

A screenshot of the 'Claim Details' form. At the top, there are tabs for 'Claim Preview', 'Attachments', 'Alert History', and 'Map'. Below the tabs, there are buttons for 'Withdraw' and 'Preview Claim'. A red banner message states: 'Claim cannot be Submitted Currently' with a sub-message 'Claim components are not complete'. Below this is a table with columns 'Component', 'Complete?', and 'Last Edited'. The table has four rows: 'General Information', 'Detail of Expenditure', 'Advance Payment Request', and 'Supporting Documentation (Advance Payment Request)'. The 'Supporting Documentation' row is highlighted in yellow. The 'Complete?' column shows green checkmarks for the first three rows and a greyed-out box for the last row. The 'Last Edited' column shows dates and times for the first three rows and a greyed-out box for the last row.

8. If supporting documentation is not required for this claim, click “No” in response to the question, “Does this claim require supporting documentation?”, then click and “Save Form”. If support documentation is required, click “Yes” to the question and click “Save Form”. Supporting documentation is required for certain budget categories. Consult [the Claims 101 document](#) if you are unsure whether supporting documentation is required for this claim.

A screenshot of the 'Supporting Documentation' form. At the top, there is a tab for 'Supporting Documentation'. Below the tab, there is a text prompt: 'Consult the Claims 101 document if you are unsure whether supporting documentation is required for this claim.' Below this is a question: 'Does this claim require supporting documentation?'. There are two buttons: 'Yes' and 'No'. The 'No' button is highlighted in yellow. At the bottom right, there is a 'Save Form' button. A red arrow points to the 'Save Form' button.

9. If you clicked “Yes”, you will see a “Supporting Documentation” table appear. **For each document you would like to upload, click the “Add New Attachment” button, upload the appropriate file, write a description of the attachment, and click the “Save File” Button.**

[\[Back to Top\]](#)

Please attach any claim supporting documents.

Supporting Documentation - Other Attachments

✓ Mark as Complete Add New Attachment

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

Last Edited By: Evan Tester - Jun 9, 2025 5:55 PM

Attach File

Save File Cancel

Upload File*: Select file

Description*:

500 character(s) left

10. Once all attachments are uploaded, click the “Mark as Complete” button.

Please attach any claim supporting documents.

Supporting Documentation - Other Attachments

✓ Mark as Complete Add New Attachment

Description	File Name	Type	Size	Upload Date	Delete
blah	Logo in Gray.jpg	jpg	803 KB	06/09/2025 05:58 PM	Delete

Last Edited By: Evan Tester - Jun 9, 2025 5:58 PM

11. When all four components have been marked complete, you will notice a green section above the grant components lists that says, “Claim is in compliance...”. Click the “Submit Claim” button. You will be asked to confirm that you would like to submit the claim. If you are ready, click the “Submit” button.

Claim Preview Attachments Alert History Map

Claim Details

✓ Submit Claim ✕ Withdraw Preview Claim

• Claim is in compliance and is ready for Submission!

Component	Complete?	Last Edited
General Information	✓	Nov 20, 2025 4:41 PM - Hilary Tester
Advance Payment Verification	✓	Dec 16, 2025 11:24 AM - Evan Tester
Claim Supporting Documentation	✓	Dec 16, 2025 11:28 AM - Evan Tester

Please confirm

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

Cancel Submit