ODF-UCF Subrecipient Tutorial: Submitting a Claim
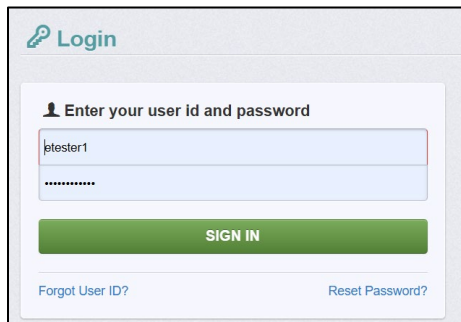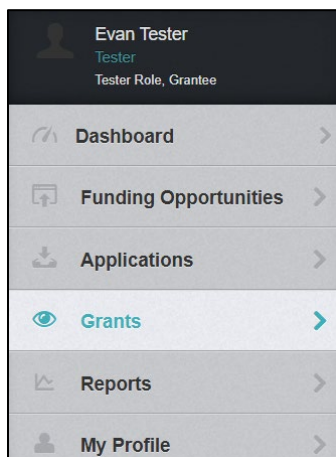
Claims Tutorial Video

- 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".**

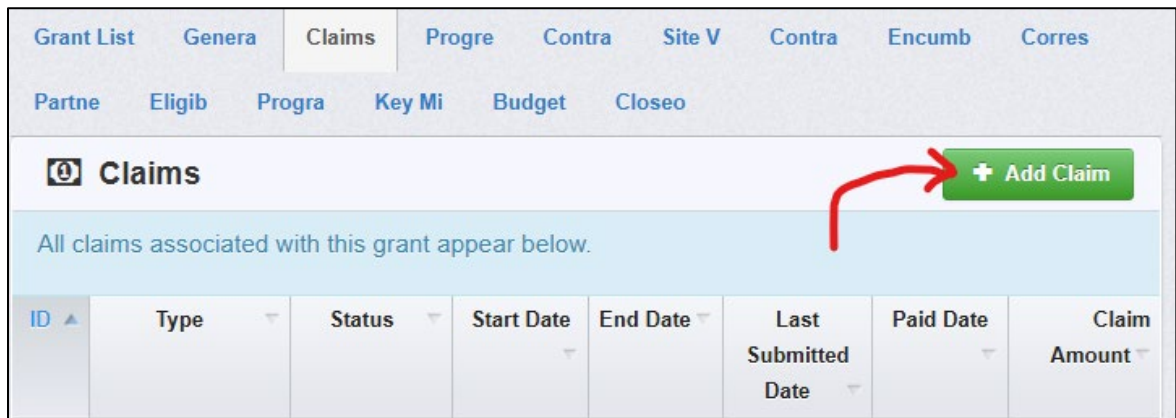**3. Select the grant you would like to access in the "Current Grants" listing.**

Current Grants	Closed Grants	Search Claims

⦂ Current Grants

All active grants are listed below.

Search: [   ]

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
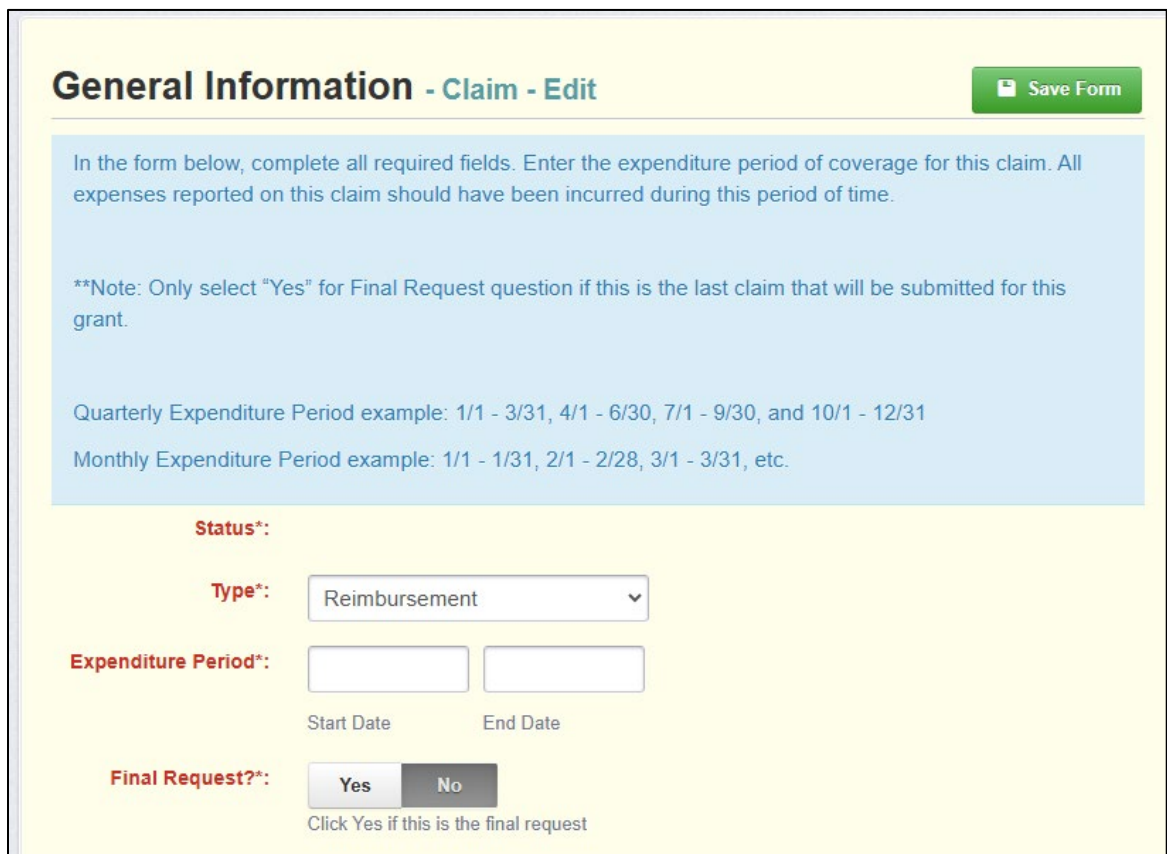
5. Click "Add Claim".

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

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.

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.

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).**

10. **Click the "Save Form" button to finish the "General Information" form.**

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.***

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.

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		-

3. **Click on the <u>Details of Expenditure</u> form in the grant component list.**

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

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).*

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.*

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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.**

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:**

   a. <u>Grant Budget Awarded</u> – 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.*

   b. <u>Expensed This Period</u> – The total amount expensed for each budget category in this request.

c. <u>Prior Expenses (Paid)</u> – The total amount paid before this request for each budget category, either through reimbursement or advance payment.

d. <u>Total</u> – The combined total of "Prior Expenses (Paid)" and "Expenses This Period" columns.

e. <u>Available Balance (Unpaid)</u> – The difference between the "Grant Budget Awarded" and the "Total" columns.

f. <u>Prior Expenses (Submitted Not Paid)</u> – Total of previously submitted payment requests that have yet to be paid.

g. <u>Total Claimed</u> – The combined total of "Expenses This Period", "Prior Expenses (Paid)", and "Prior Expenses (Submitted Not Paid)" columns.

h. <u>Remaining Balance (Unclaimed)</u> – The difference between the "Grant Budget Awarded" and "Total Claimed" columns.

⊞ 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.**

⊞ 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								

10. **Click on the <u>Reimbursement Request</u> form in the grant component list.**

11. **Complete the form by 1) entering your SAM.gov Unique Entity Identifier (UEI), 2) attaching a screenshot of your active UEI status (see <u>SAM.gov status tutorial</u>), 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.**

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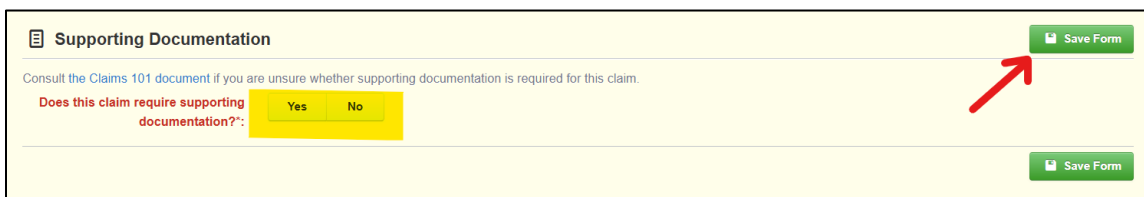

13. **Click on the "Supporting Documentation" form.** *Note: To ensure proper reimbursement and tracking of grant funds, it is important to submit claims with proper documentation (see the Claims 101 document for supporting documentation requirements).*

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.

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.**

16. **Once all attachments are uploaded, click the "Mark as Complete" button.**

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.**
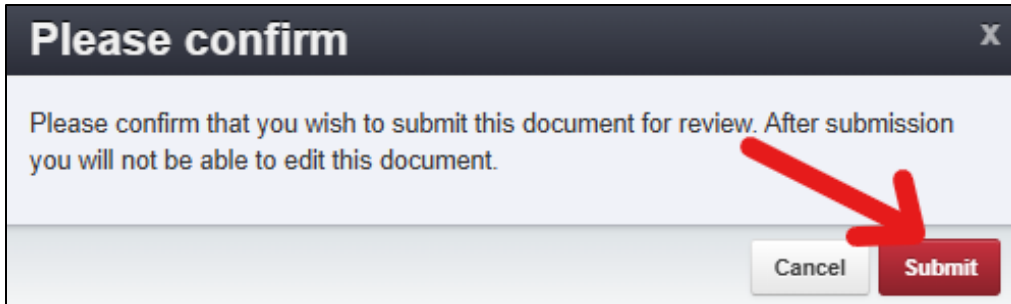
Advance Payment Request

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.
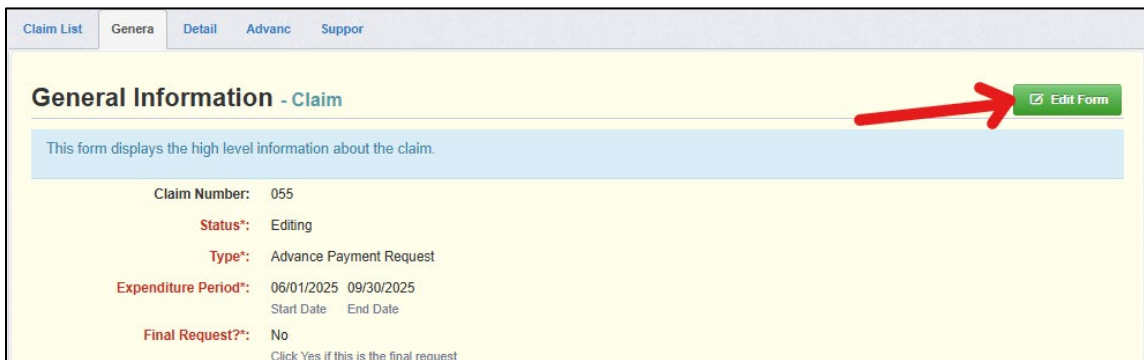
2. **You can update the Expenditure Period and Final Request status by clicking on the** <u>**General Information**</u> **form in the component list and then clicking on the "Edit Form" button.**
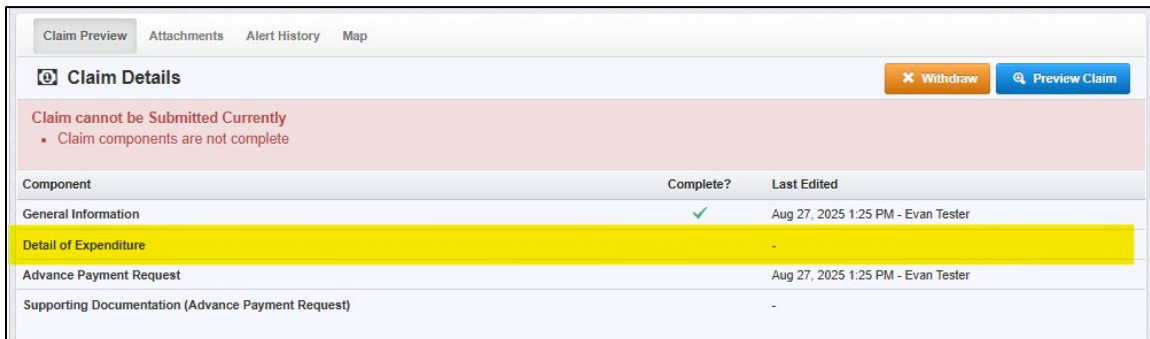

3. **Click on the** <u>**Details of Expenditure**</u> **form in the grant component list.**

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

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.*

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.*

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.**

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).**

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 <u>Advance Payment Request</u> form in the grant component list.**

11. **Complete the "<u>Advance Payment Request</u>" form.**

   a. Enter your SAM.gov Unique Entity Identifier (UEI) and a screenshot of your active UEI status (see <u>SAM.gov status tutorial</u>).

   b. Certify that advance payment is needed to fund the project's operation.

   c. Clearly describe why advance payment is necessary and provide a timeline for completing the work funded through this advance.

   d. 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.

   e. Provide a summary of how each expense listed in the Details of Expenditure form contribute to project scope of work.

   f. 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.

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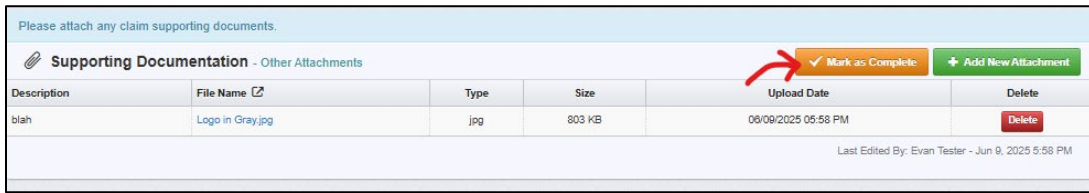

18. Click on the "**Supporting Documentation**" form. *Note: To ensure proper reimbursement and tracking of grant funds, it is important to submit claims with proper documentation (see the* Claims 101 document *for supporting documentation requirements).*

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.**

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.**
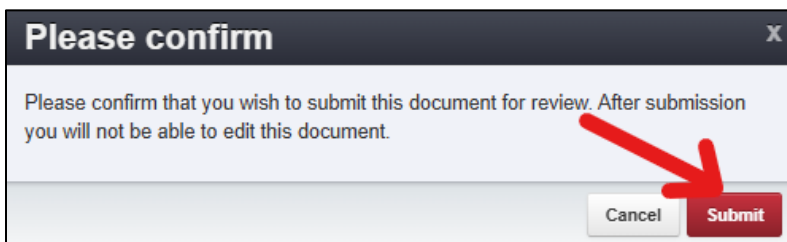

Advance Payment Verification

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).

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.*

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.**
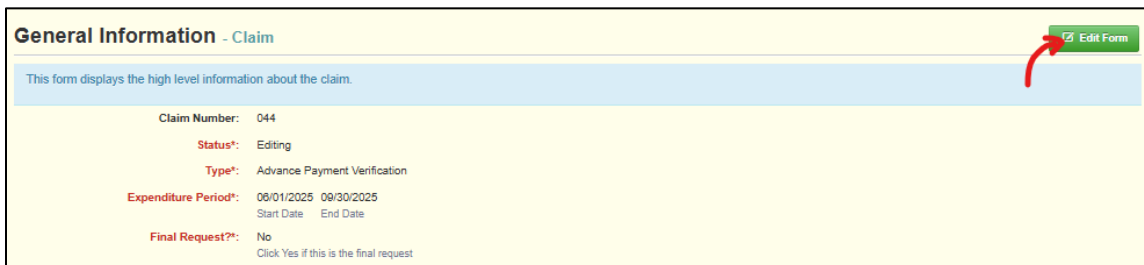

3. **Click on the "Advance Payment Verification" form in the grant component list.**

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.

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).*

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.

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.**

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

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.