

## **Submitting a Claim in WebGrants**

The purpose of this document is to provide instructions for how to submit a Claim in WebGrants.

**Note:** What was previously described as a 'Reimbursement Request' in OLGA will now be described as a 'Claim' in WebGrants.

## Instructions for Submitting a Claim

1. Begin at the WebGrants landing page at <u>https://grants.drpt.virginia.gov</u>. On the Login page, enter your User ID and Password, then click "Sign In".

ORPT VIRGINIA AND PUBL	DEPARTMENT OF RAIL IC TRANSPORTATION
P Login	
L Enter your user id and password	Announcements
User ID	DEDT SYSTEM USE NOTIFICATION
Password	This system is the property of the Commonwealth of Virginia. Only persons authorized shall be allowed
SIGN IN	access to this system. Those permitted access shall use this system ONLY for purposes for which they have been authorized. ALL access and usage on this system may be monitored, recorded, and subjec to audit. ANY unauthorized access, use, or abuse of this system or the information contained therein shall be reported to appropriate authorities for investigation and prosecution to the fullest extent of the
Forgot User ID? Forgot Pass	word?

2. Once logged in, you'll see the WebGrants main menu. On the left-hand panel, click "Grants" to search for the grant that you would like to submit a claim against.

Test Tester External User Sile Visitor ASSIGNED - Edemal, Contact - External Discourse	Work Assignment All currently assigned work Assignment Calendar Alerts My Reviews My Site Visits Document Repository						
(7) Dashboard >	★ Back  Plint  Plin						
Funding Opportunities	🖇 Approaching Deadlines - Next 30 Days 🖆 Wew Overdue Approaching Deadlines						
📥 Applications >	This section displays the documents with due dates arriving in the next 30 days or overdue.						
Grants	Due Date A Document Sub-Type ID Status Title Program Area Funding Opportunity						
🗠 Reports 📎	No data available in table						
A My Profile	Recent Negotiations - Due Within 30 Days						
	This section displays the documents that you negotiated in the last 30 days.						
	Due Date A Document Type Sub Type/Round D Document Type Sub Type/Round D Document Type Status Title Organization Program Area Funding Opportunity						



3. A list of "Current Grants" will appear. Click on the grant that you would like to submit a claim against.

Test Tester External User Site Visitor ASSIGNED - External,		Gra List of all current g	nt							
Ch Dashboard	>		🖨 Print 🔻	Onlin	e Help 🕞 Log Out					
Funding Opportunities		Current Grants	Closed Grants	Search C	laims					
📥 Applications 🔷		i≣ Current	Grants							
Grants >	•	All active grants	are listed below.							
🗠 Reports 📏									Search:	
👗 My Profile >		ID 🔺	Status 🗸	Year 🔻	Title	Organization	Program Area	Funding Opportunity	Duration V	Grant Amount
		337	Underway	2023	DTPI_Test Grant	BaseLine Organization	TP-Transit Program	331-Transit Ridership Incentive Program (TRIP) - Public Safety - FY25	-	\$50,000.00
		43024-98	Underway	2023	Jess Test other cap	Virginia Department of Rail and Public Transportation	TP-Transit Program	360-FTA 5310 Human Services Grant Program - Other Capital - FY25	10/01/2024 - 09/30/2025	\$660.00
		4402317	Underway	2023	FTA5310 New Freedom Mobility Management - GRTC (Richmond)	Greater Richmond Transit Company	TP-Transit Program	658-DRPT Legacy Transit	10/01/2022 - 09/30/2023	\$81,622.00
		46025-01	Underway	2025	FY25 5303 RRTPO	BaseLine Organization	TP-Transit Program	6-FTA 5303 - FY25	07/01/2024 - 06/30/2025	\$500,000.00
		498	Underway	2024	Fiscal Test Grant - RIA	Star Bright Inc. (DTPi Test Organization)	RP-Rail Program	1-Rail Industrial Access Grant (RIA) - 2024	-	\$1,001,000.00
		5007301	Underway	2023	GRTC (Richmond) - TRIP Regional Connectivity	Greater Richmond Transit Company	TP-Transit Program	658-DRPT Legacy Transit	01/01/2023 - 12/31/2023	\$2,907,200.00
		501	Underway	2024	Fiscal Test Grant - 166 Operating	BaseLine Organization	TP-Transit Program	10-I-66 Operating Program - FY25	-	\$0.00

**Note:** You will only see the grants that your profile is associated with. By default, the WebGrants system assigns the individual who applied for that grant to be the point of contact for that grant once it is awarded. That individual has the ability to submit claims and perform other grant related activity. If additional users need to be added to the grant, please refer to the 'User Management' training materials.

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

	Sack	🔁 Print 🔹	Online Help	🕒 Log Out					
Test Tester External User									
Site Visitor ASSIGNED - External,	337 -	DTPi_Test Gra	int - 2023						
🗇 Dashboard			Status:	Underway					
Eunding Opportunities			Program Area:	Transit Program					
city i ditaling opportunities		Fu	nding Opportunity:	331-Transil Ridership Incentive Program (TRIP) - Public Safety - FY25					
📥 Applications 🔰			Organization:	useLine Organization					
			Grantee Contact:	Test Tester					
Grants			Program Officer:	Daniel Sonenklar					
🗠 Reports 🔰		Total Projec	t Awarded Amount:	\$50,000.00					
🔺 My Profile >	i≣ Grant	t Components		Q. Preview Grant					
	The grant for	ms appear below.							
	Component			Last Edited					
	General Informa	ation		Nov 17, 2023 1:34 PM - Transit Tester					
	Status Reports								
	Claims								
	Contract Amend	dments							
	Site Visits								
	Contract								
	Encumbrances			Oct 27, 2023 3:08 PM - Zach Trogdon					
	Correspondenc	e							
	Budget	47 a							
	Project Informa	tion							
	Budget Details	-							
	Project Schedu	IG.							



## 5. Click "Add Claim"

Test Tester External User Site Visitor ASSIGNED - External,	Grant List of all current grants									
Ch Dashboard >	🔶 Back 🔿 Print 🗸	Online Help	G+ Log Out							
Funding Opportunities	337 - DTPi_Test Gr	rant - 2023								
📥 Applications 🔷 🗧		Status:	Underway							
Grants >		Program Area:	Transit Program	Transit Program						
🗠 Reports 🔷 📏	-	Unding Opportunity: Organization:	331-Transit Ridership Incentive BaseLine Organization	Program (TRIP) - Public Safeti	/ - FY25					
🚔 My Profile >	Total Proje	Grantee Contact: Program Officer: ect Awarded Amount:	Test Tester Daniel Sonenklar \$50,000.00							
	Grant List Genera Status	Claims Contra	Site V Contra Encumt	b Corres Budget P	rojec Budget Projec	Attach Closeo				
	Claims							+ Add Claim		
	All claims associated with this	grant appear below.								
	ID 🔺	Туре	Status	Start Date	End Date	Last Submitted Date	T Paid Date T	Claim Amount		
	337 - 001	Reimbursement	Approved	10/01/2023	10/31/2023	Oct 27, 2023 3:05 PM		\$10,000.00		
	337 - 002	Reimbursement	Submitted	11/01/2023	11/11/2023	Nov 17, 2023 1:54 PM		\$4,500.00		
	337 - 003	Reimbursement	Submitted	10/01/2023	10/31/2023	Nov 17, 2023 2:20 PM		\$2,000.00		
							Submitted Amount:	\$6,500.00		
							Approved Amount:	\$10,000.00		
							Awaiting Payment Amount:	\$0.00		
							Paid Amount:	\$0.00		

6. You will be directed to the "Claim General Information" form. Complete the fields on the form, then click "Save Form"

Test Tester External User Site Visitor ASSIGNED - External,	C G	ent grants		
⑦ Dashboard >	Sack 8	🔁 Print 🔻	Ø Online Help	🕒 Log Out
Funding Opportunities				
📥 Applications >	Gene	ral Informa	ation - Claim - E	Save Form
Grants >	In the fo then the	orm below, complete Final Request che	e all required fields. Ent ckbox should be check	er the report period of coverage for this claim. All expenses reported on this claim should have been incurred during this period of time. If this is the last claim that will be submitted for this grant, ed.
🗠 Reports 🔶			Status*:	
🛔 My Profile >			Type*:	Reimbursement -
			Report Period:	
			Final Request?*:	Start Date End Date           Ves         No           Click Yes if this is the final request

**Note:** The system will create a claim number as soon as you clicked 'Save.' If you log out of the system at this point or any future point, your claim will remain in the system until it is submitted.

7. Once the General Information has been completed, you will be returned to the Claim Details module. Click "Reimbursement"



Test Tester External User Site Visitor ASSIGNED - External,	Sack 🕀 Print -	Online Help	🕒 Log Out						
7 Dashboard	Claim: 004								
Funding Opportunities		Claim Status:	Editing						
📥 Applications >		Program Area:	Transit Program						
Grants >		Funding Opportunity: 331-Transit Ridership Incentive Program (TRIP) - Public Safety - FY25 Reporting Period: -							
🗠 Reports 📎		Claim Type: Reimbursement							
🚨 My Profile >		Submitted By:							
	Claim Preview Attachme	nts Alert History Mag							
	Olaim Details				Q. Preview Claim				
	Claim cannot be Submitte • Claim components are	d Currently not complete							
	Component		Complete?	Last Edited					
	General Information		✓	Nov 29, 2023 10:58 AM - Test Tester					
	Reimbursement Supporting Documentation			-					

8. Once the "Reimbursement" form appears, click on "Edit Reimbursement" to enter incurred expenses

🗗 Reimburse	ment - Current Version						
Reimburser	ment						
Budget Category	Grant Budget Awarded	Expenses This Period	Prior Expenses (Paid)	Total	Available Balance (Unpaid)	Prior Expenses (Submitted Not Paid)	Total Claimed
Total Project Cost							
Awarded Amount	\$50,000.00	\$0.00	\$0.00	\$0.00	\$50,000.00	\$16,500.00	\$16,500.00
	\$50,000.00	\$0.00	\$0.00	\$0.00	\$50,000.00	\$16,500.00	\$16,500.00
	\$50,000.00	\$0.00	\$0.00	\$0.00	\$50,000.00	\$16,500.00	\$16,500.00

9. Enter incurred expenses in the "Expenses This Period" field and click "Save Reimbursement"

Reimburse	ement - Current Version							
Reimburse	ment - Edit							Save Reimbursement
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)
Total Project Cost								
Awarded Amount	\$50,000.00	0.00	\$0.00	\$0.00	\$50,000.00	\$16,500.00	\$16,500.00	\$33,500.00
	\$50,000.00	\$0.00	\$0.00	\$0.00	\$50,000.00	\$16,500.00	\$16,500.00	\$33,500.00
								Save Reimbursement

## 10. Click "Mark as Complete"

Reimburse	ment - Current Version							
Reimburser	nent						✓ Mark as Comple	ete 🗹 Edit Reimbursement
Budget Category	Grant Budget Awarded	Expenses This Period	Prior Expenses (Paid)	Total	Available Balance (Unpaid)	Prior Expenses (Submitted Not Paid)	Total Claimed	Remaining Balance (Unclaim
Total Project Cost								
Awarded Amount	\$50,000.00	\$25,000.00	\$0.00	\$25,000.00	\$25,000.00	\$16,500.00	\$41,500.00	\$8,50
	\$50,000.00	\$25,000.00	\$0.00	\$25,000.00	\$25,000.00	\$16,500.00	\$41,500.00	\$8,50
	\$50,000.00	\$25,000.00	\$0.00	\$25,000.00	\$25,000.00	\$16,500.00	\$41,500.00	\$8,50



11. The last step before submitting a claim is to attach supporting documentation. Click "Supporting Documentation"

Test Tester External User Site Visitor ASSIGNED - External,	Sack	🖶 Print 👻	🚱 Online Help	🕒 Log Out			
⑦ Dashboard >	Claim:	004					
Funding Opportunities		Fun	Claim Status: Grant Title: Program Area: Iding Opportunity: Reporting Period: Claim Type:	Editing 337 - DTPL_Test Grant Transit Program 331 - Transit Ridership Incentive Program (TRIP) - F - Reimbursement	Public Safety - FY25		
📥 My Profile >			Submitted By:	-			
	Claim Preview	Attachments	Alert History Map				
	O Claim I	Details					A Preview Claim
	Claim cannot • Claim com	be Submitted Cu ponents are not co	omplete				
	Component				Complete?	Last Edited	
	General Information	on			×	Nov 29, 2023 10:58 AM - Test Tester	
	Reimbursement Supporting Docur	mentation				-	

12. You will be prompted to answer whether you have supporting documentation. Click "Yes" and then "Save Form"

Supporting Documentation - Current Version
E Supporting Documentation
Do you have any documentation to add? Documentation*: Yes No
D Save Form

13. On the following page, click "Add New Attachment" to upload your supporting documentation

Funding Opportunities	Claim List Genera Reimbu	Suppor						
📥 Applications 🔷 👌	Supporting Documer	tation - Current Version						
Grants >								
🗠 Reports 🔰 刘	Supporting Documer	ntation				Mark as Complete I Edit Form		
🚢 My Profile >	Do you neve in y occumentation to would Documentation*: Yes							
	Last Edited By: Test Tester - Nov 2	29, 2023 11:08 AM 🗹 Edit Form						
	Documentation - Other Attachments 🗸 Mark as Complete 🕹 Add New Attaca							
	Description	File Name 🗹	Туре	Size	Upload Date	Delete		
	No files attached.							
	Last Edited By: Test Tester - Nov 29, 2023 11:08 AM							



14. In the popup box, upload your attachment and enter a short description. Click "Save File"

Funding Opportunities	Claim List Genera	Reimbu Suppor				
📥 Applications 🔰 🚿	🗗 Supp 🖉 🖡	Attach File			×	
@ Grants >		Attach File			Save File X Cancel	
🗠 Reports 🔷 🗦	E Supp	Attach The				Mark as Complete
A My Profile	Do you have a	Upload File":	Reimbursement Backup.xisx     Cha	inge Remove		
		Description*:	Reimbursement Backup 480 character(s) left			By: Test Tester - Nov 29, 2023 11:14 AM 🕑 Edit Form
	@ Docur					Mark as Complete 💠 Add New Attachment
	Description					e Delete
	-		No	lies attached.		
						Last Edited By. Test Tester - Nov 29, 2023 11:14 AM

15. On the following page, click "Mark as Complete"

Applications	Europorting Decumentati							
		on - Current Version						
Grants >								
Reports >	Supporting Documentation	on			✓ Mark as	Complete 🛛 Edit Form		
My Profile >	Do you have any documentation to add? Documentation*: Yes							
	Last Edited By: Test Tenter - Nov 29, 2023 11:15 AM							
	Documentation - Other Attachments     Add New Attachment     Add New Attachment							
	Description	File Name 🗹	Туре	Size	Upload Date	Delete		
	Reimbursement Backup	Reimbursement Backup xlsx	xisx	8 KB	11/29/2023 11:15 AM	Delete		

16. You have completed the necessary steps required to submit a claim. Click the "Submit Claim" button to release the claim for DRPT review.

Funding Opportunities							
	Claim: 004						
📥 Applications >	Claim Status:	Editing					
	Grant Title:	337 - DTPi_Test Grant					
Grants /	Program Area:						
🗠 Reports 🔰	Funding Opportunity:	331-Transit Ridership Incentive Program (TRIP) - Public Safet	ty - FY25				
	Reporting Period: -						
A My Profile	Claim Type: Reimbursement						
	Submitted By:						
	Claim Preview Attachments Alert History Map						
	🚯 Claim Details 🗸 Withdaw 🔍						
	Claim is in compliance and is ready for Submission!						
	Component	Ci	omplete?	Last Edited			
	General Information		×	Nov 29, 2023 10:58 AM - Test Tester			
	Reimbursement		×	Nov 29, 2023 11:04 AM - Test Tester			
	Supporting Documentation		×	Nov 29, 2023 11:15 AM - Test Tester			

**Note:** All forms can be edited and saved as often as needed but the system will require that **all** fields marked as required **must** have entries and **every** form must be "Marked as Complete" to submit. You will receive a pop-up message notifying you of this if you try to submit without completing these steps.