Standard Work for: Submitting a Reimbursement Request in E-Grants

Description of the task:	How to Submit an Invoice in E-Grants	Revision Date: 9/5/19
Process Owner:	Sara Allred / Angela Ringor / Dan Gabiou	Revision #:
Purpose:	To provide step-by-step procedures	Document Owner: Dan Gabiou

	Steps	Notes
1	**Open E-Grants in Internet Explorer**: https://egrants.azdot.gov/	E-Grants is only certified to function successfully using the **Internet Explorer** browser.
2	To start a new reimbursement request… Click on **My Applications** tab	**If you've already started a reimbursement request**, **select My Reimbursement Requests** tab to search for an existing reimbursement request.
3	Under **Application Types** → Select **Planning Application-2019: 2019** → Click on **Search**	
4	Click on the **Name** link of the correct application	Note the Current Status. This will change to "Reimbursement Request Submitted" once you have finished submitting your reimbursement request.
5	Under **Contracts, Invoices, & Reporting**, Click on **VIEW RELATED ITEMS**	
6	Click on **Initiate a Planning Reimbursement Request**	
7	Under **View, Edit and Complete Forms**, Click on **VIEW FORMS**	You are now in the Reimbursement Request document.
8	Click on **Reimbursement Request**	You will receive a message with a list of errors. These errors are fields you must fill in before the submitting the reimbursement request. The Page Warning is for when an award line has been marked as complete and letting you know that you can no longer bill for that line.
9	Under **Billing Period**, select the **month and year**	

For technical support, contact Diane Ohde (602.712.7465 or DOhde@azdot.gov) or Sara Allred (602.712.4498 or SAllred@azdot.gov)

10 (Optional)	You have the **option** to **replace the Invoice Number** to match your financial system	**You do not need to update the Invoice Number.** The Invoice Number is automatically generated for you. If you use your own invoice number, it must be unique for each invoice.
11	Under the **Reimbursement Request** column**, type the total amount** (federal + local match) you are requesting for each funding source	You may request reimbursement for all applicable funding sources as one reimbursement request, or submit separately. **NOTE: If you choose to submit separate reimbursement requests, you must wait to submit the next request until ADOT MPD submits your current invoice for payment.**
12	Under the **Project Complete** column, **select Yes or No for each row** Select **SAVE** for the system to auto-calculate the reimbursement Request Section.	The system will place an asterisk if the question was changed to 'No' and was a 'Yes' on a previous reimbursement request.
13	Select **Yes or No** to the question: **Does this reimbursement include any Final Invoices for Procurements?**	If Yes (this is a Final Invoice), you must also complete the DBE Section.
14	In the **ATTACH BACK-UP DOCUMENTATION** section, click on **Browse** and attach supporting documentation for each funding source	**What to Attach?** **1) Progress Report** (one for all FHWA funding sources accepted) **2) Expense Report** (from COG/MPO Financial System) **3) Receipts** (Travel, Training, and Major Procurements only) Please name attachments by funding source and billing period: July2019ProgressReport, July2019SPR, July2019PL, July2019STBG The below items are no longer required. Please do **NOT** attach: a) In-Kind Tracking Sheet (now embedded in E-Grants) b) Subrecipient Project Summary sheet c) Meal receipts (though meal reimbursement must still comply with the SAAM, not include alcohol costs, and be retained for audits)
15	Enter all **Cash Match** and **In-Kind Match** per funding source	
16	Select **I Agree** to both prompts and enter any comments	

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17	Click on **Save**	If all errors are corrected, you will see this message, "The information has been saved."
18	Click on the **Document Information** link to return to the document menu	
19	Under **Change the Status**, Click on **VIEW STATUS OPTIONS**	
20	Under **REIMBURSEMENT REQUEST SUBMITTED**, Click on **APPLY STATUS**	**DONE!** You can initiate your next reimbursement request once your current request has been Submitted for Payment or the Status has been updated to PAID.

For additional guidance, please visit the ADOT Transit website at https://azdot.gov/node/5671.

E-Grants Subreceipient's User Guide: https://azdot.gov/sites/default/files/2019/08/E-Grants-Subrecipient-User-Guide.pdf

E-Grants Planning WP Reimbursement Request Presentation: https://azdot.gov/sites/default/files/2019/09/egrants-reimbursement-request-training-081919.pdf

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