

# Standard Budget Claim Form Guide – External Users

Claims are given a number based on the order they are entered into the system: The title of the grant with an incremental number for each claim entered.

The Status indicates what stage the claim is currently in.

- Editing - The claim data was entered but the claim is not submitted for payment.
- Submitted - The claim data was entered and the claim was submitted for payment .
- Approved - The claim has been reviewed and approved for payment by a IDPH Grant Manager.
- Paid – A state warrant or EFT notice has been sent out to the Grantee.

1. Login to [www.iowaGrants.gov](http://www.iowaGrants.gov) .



2. Select My Grants on this main menu.

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The screenshot shows the Iowa Grants website interface. At the top, there is a navigation bar with the Iowa logo and the text "IowaGrants.gov". Below this is a secondary navigation bar with links for Menu, Help, Log Out, Back, Print, Add, Delete, Edit, and Save. The main content area is titled "Grant Tracking" and contains two tabs: "Current Grant/Projects" (selected) and "Closed Grant/Projects | Claims". Below the tabs is a table of current grants. The table has columns for ID, Status, Year, Title, Program Area, Grant Administrator, and Grant/Project Amount. The data rows are as follows:

ID	Status	Year	Title	Program Area	Grant Administrator	Grant/Project Amount
78701	Underway	2015	CDOR John McMullen TEST	Emergency Preparedness & Response	John McMullen	\$336,095.00
5885XX##	Underway	2015	TEST MIECHV Project	Family Health	Stacey Hewitt	\$159,000.00
77676	Underway	2014	LPHS Pre-Post TEST Feb 2014	Local Public Health Services	Stacey Hewitt	\$500,000.00
<b>Total</b>						<b>\$995,095.00</b>

At the bottom right of the table, it says "Showing 1 - 3 of 3". Below the table, there is a footer with the text "Iowa.gov – The Official Website of the State of Iowa." and "Dulles Technology Partners Inc."

3. Select the desired Grant from the list to enter data for a claim.

4. Click the Grant Title to open the specific Grant for editing. (Notice that the Title is a different color blue. This indicates that the wording is a link and will open another screen for editing or viewing.) The Grant record is displayed.

The screenshot shows the details for a specific grant project. The header includes the Iowa logo and "IowaGrants.gov". The navigation bar is the same as in the previous screenshot. The main content area is titled "Grant Tracking" and shows the details for the grant "5885XX## - TEST MIECHV Project - 2015". The details are as follows:

- Status: Underway
- Program Area: Family Health
- Grantee Organization: Test Company IDPH only
- Program Officer: Stacey Hewitt
- Awarded Amount: \$159,000.00

Below the details is a section titled "Instructions" with the text "The grant forms appear below." Below that is a section titled "Grant/Project Components" with the text "You can define your own alerts in the Alerts section". Below this is a table of components:

Component	Last Edited
General Information	08/22/2014
Claims	
Progress Reports	
Site Visits	
Correspondence	08/22/2014
Cover Sheet-General Information	08/08/2014
Key Personnel	08/08/2014
Project Work Plan	08/08/2014
Subcontract Plan	08/08/2014
Budget Without Match	08/08/2014
Contract Documents	
Opportunity	-
Application	-

The "Claims" component is circled in blue. At the bottom, there is a footer with the text "Iowa.gov – The Official Website of the State of Iowa." and "Dulles Technology Partners Inc."

5. Click Claims in the listed grant components.

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Menu | Help | Log Out | Back | Print | **Add** | Delete | Edit | Save

**Grant/Project Tracking**

Grant/Project: 5885XX## - TEST MIECHV Project - 2015

Status: Underway  
Program Area: Family Health  
Grantee Organization: Test Company IDPH only  
Program Officer: Stacey Hewitt  
Awarded Amount: \$159,000.00

Claims [Copy Existing Claim](#) | [Return to Components](#)

ID	Type	Status	Date Submitted	Date Paid	Date From-To	Claim Amount
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6. Click the Add button (top right of page) to start a new claim form.

The system will display a screen to input the starting and ending dates the claim will represent. This will allow you to group expenses by time periods.

lowaGrants.gov

Menu | Help | Log Out | Back | Print | Add | Delete | Edit | Save

**Grant Tracking**

**Claim General Information**

To create a new Claim enter the starting date and the ending date of the Report Period. This is the period of coverage for this Claim.

Claim Type: Reimbursement

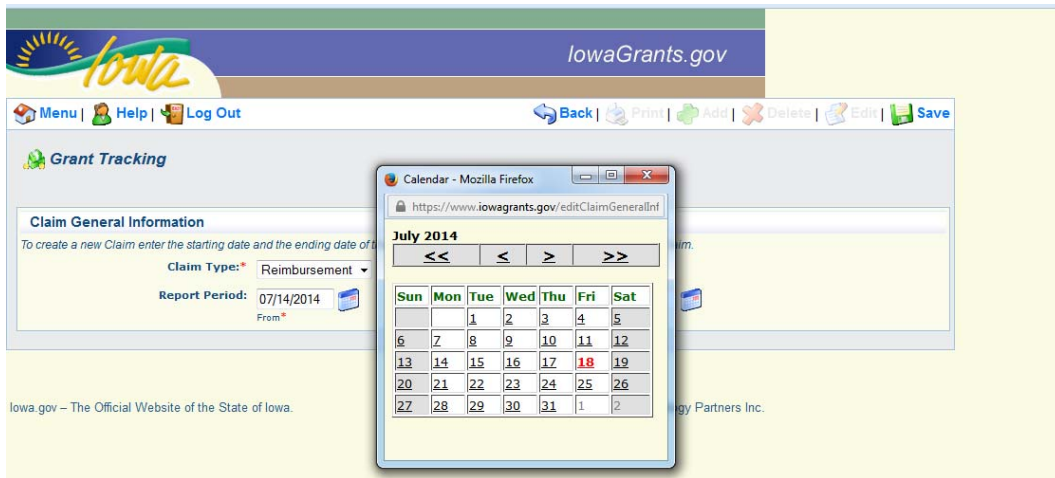
Report Period: From to

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7. Enter the Starting Date and End Date of the Reimbursement period (first and last date of the services for which you are requesting reimbursement).

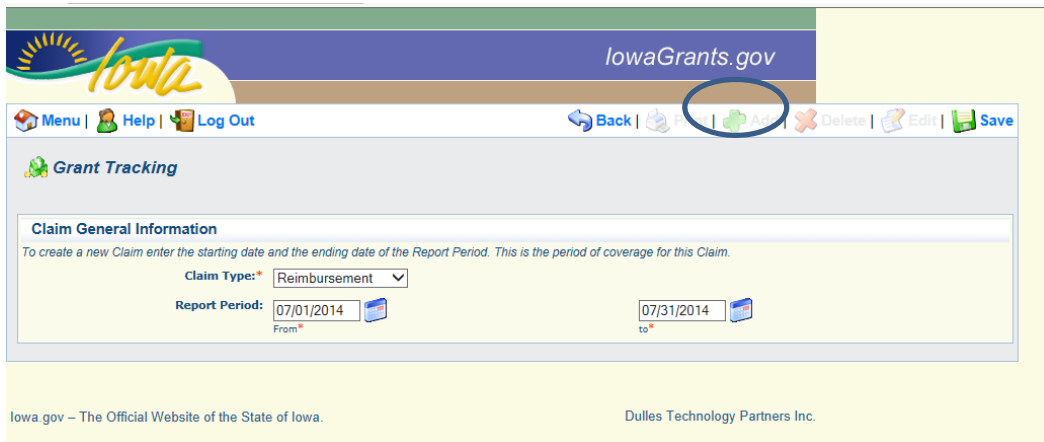
Use the Date Picker by clicking the small calendar icon to the right of the Report period for the Start Date of the reimbursement period. You may also type in the date using MMDDYYYY format (system will automatically add slashes into the field).

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Click on the calendar date to select the first day of the period for which reimbursement is requested.

Repeat this for the End Date.



8. The beginning and end dates are displayed in the fields in the correct formats.

Click Save (upper right corner) to save the dates.

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**Grant Tracking**

Claim: 5885XX## - 011 [Grant Components](#)

Grant: **5885XX##-TEST MIECHV Project**  
Status: Editing  
Program Area: Family Health  
Grantee Organization: Test Company IDPH only  
Program Manager: Stacey Hewitt

**Reporting Period** [Return to Components](#)

Claim Type:\* Reimbursement  
Report Period: 07/01/2014 From 07/31/2014 to  
Claim Status:\* Editing

Last Edited By: Bof Tester, 08/23/2014

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9. Click Return to Components (on the Line to the right of Reporting Period) to access the next screen in Claims.

**Components** [Preview](#) | [Submit](#)

Complete each component of the Claim and mark it as complete. Click Submit when you are done.

Name	Complete?	Last Edited
<a href="#">General Information</a>	✓	08/23/2014
<a href="#">Reimbursement</a>		

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10. Click on Reimbursement in the Components section.

# Standard Budget Claim Form Guide – External Users

**Grant Tracking**

Claim: 5885XX## - 001 [Grant Components](#)

Grant: **5885XX##-TEST MIECHV Project**

Status: Editing

Program Area: Family Health

Grantee Organization: Test Company IDPH only

Program Manager: Stacey Hewitt

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**Reimbursement** [Mark as Complete](#) | [Go to Claim Forms](#)

Budget Category	1 Approved Budget	2 Expenses This Period	3 Paid Claims	4 Total Claimed (All Statuses)	5 Unclaimed Balance (1-4)
<b>Salaries and Fringe/Benefits</b>					
CEO	\$11,400.00	\$0.00	\$0.00	\$0.00	\$11,400.00
CFO	\$5,600.00	\$0.00	\$0.00	\$0.00	\$5,600.00
Consultant	\$42,000.00	\$0.00	\$0.00	\$0.00	\$42,000.00
Consultant	\$32,000.00	\$0.00	\$0.00	\$0.00	\$32,000.00
Coordinator	\$60,000.00	\$0.00	\$0.00	\$0.00	\$60,000.00
<b>Subcontract</b>					
NA	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Equipment</b>					
None	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Other</b>					
Supplies	\$5,000.00	\$0.00	\$0.00	\$0.00	\$5,000.00
Travel	\$3,000.00	\$0.00	\$0.00	\$0.00	\$3,000.00
<b>Total:</b>	<b>\$159,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$159,000.00</b>

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11. Select Edit to open the Expenses This Period fields for data entry.

# Standard Budget Claim Form Guide – External Users

**lowaGrants.gov**

Menu | Help | Log Out | Back | Print | Add | Delete | Edit | **Save**

**Grant Tracking**

Claim: 5885XX## - 001 Grant Components

Grant: 5885XX##-TEST MIECHV Project  
 Status: Editing  
 Program Area: Family Health  
 Grantee Organization: Test Company IDPH only  
 Program Manager: Stacey Hewitt

Budget Category	1 Approved Budget	2 Expenses This Period	3 Paid Claims	4 Total Claimed (All Statuses)	5 Unclaimed Balance (1-4)
<b>Salaries and Fringe/Benefits</b>					
CEO	\$11,400.00	\$0.00	\$0.00	\$0.00	\$11,400.00
CFO	\$5,600.00	\$0.00	\$0.00	\$0.00	\$5,600.00
Consultant	\$42,000.00	\$0.00	\$0.00	\$0.00	\$42,000.00
Consultant	\$32,000.00	\$0.00	\$0.00	\$0.00	\$32,000.00
Coordinator	\$60,000.00	\$0.00	\$0.00	\$0.00	\$60,000.00
<b>Subcontract</b>					
NA	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Equipment</b>					
None	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Other</b>					
Supplies	\$5,000.00	\$0.00	\$0.00	\$0.00	\$5,000.00
Travel	\$3,000.00	\$0.00	\$0.00	\$0.00	\$3,000.00

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12. Enter the reimbursement amount in the appropriate lines in the Expenses This Period column.

Click Save when the data has been entered.

# Standard Budget Claim Form Guide – External Users

**Grant Tracking**

Claim: 5885XX## - 001 Grant Components

Grant: 5885XX##-TEST MIECHV Project  
 Status: Editing  
 Program Area: Family Health  
 Grantee Organization: Test Company IDPH only  
 Program Manager: Stacey Hewitt

**Reimbursement** Mark as Complete [Go to Claim Forms](#)

Budget Category	1 Approved Budget	2 Expenses This Period	3 Paid Claims	4 Total Claimed (All Statuses)	5 Unclaimed Balance (1-4)
<b>Salaries and Fringe/Benefits</b>					
CEO	\$11,400.00	\$100.00	\$0.00	\$100.00	\$11,300.00
CFO	\$5,600.00	\$0.00	\$0.00	\$0.00	\$5,600.00
Consultant	\$42,000.00	\$0.00	\$0.00	\$0.00	\$42,000.00
Consultant	\$32,000.00	\$0.00	\$0.00	\$0.00	\$32,000.00
Coordinator	\$60,000.00	\$500.00	\$0.00	\$500.00	\$59,500.00
<b>Subcontract</b>					
NA	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Equipment</b>					
None	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Other</b>					
Supplies	\$5,000.00	\$0.00	\$0.00	\$0.00	\$5,000.00
Travel	\$3,000.00	\$50.00	\$0.00	\$50.00	\$2,950.00
<b>Total:</b>	<b>\$159,000.00</b>	<b>\$650.00</b>	<b>\$0.00</b>	<b>\$650.00</b>	<b>\$158,350.00</b>

Last Edited By: Bof Tester, 08/23/2014

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13. Select Mark as Complete when data entry for the reimbursement is completed.

**Note:** the system maintains a running total of expenses and reimbursements on this claim form. As additional claims are entered, approved and paid, the system will provide the totals for:

- Paid Claims,
- Total Claimed (total of claims in Editing, Submitted and Approved status) and
- Unclaimed Balance (the amount available for future claims).



# Standard Budget Claim Form Guide – External Users

The screenshot displays the Iowa Grants.gov interface. At the top, there is a navigation bar with the Iowa logo and the text 'Iowa Grants.gov'. Below this is a secondary navigation bar with links for Menu, Help, Log Out, Back, Print, Add, Delete, Edit, and Save. The main content area is titled 'Grant Tracking' and shows details for a specific claim: 'Claim: 5885XX## - 001'. The grant information includes: Grant: 5885XX##-TEST MIECHV Project, Status: Editing, Program Area: Family Health, Grantee Organization: Test Company IDPH only, and Program Manager: Stacey Hewitt. There is a 'Grant Components' link. Below this is a 'Components' section with a 'Preview | Submit' link. A table lists the components: 'General Information' and 'Reimbursement', both marked as complete with checkmarks and showing their last edited dates (08/08/2014 and 08/23/2014 respectively). The footer contains the text 'Iowa.gov - The Official Website of the State of Iowa.' and 'Dulles Technology Partners Inc.'

**Note:** The claim data can be changed until the claim is submitted. This allows multiple people to enter claim information on a single claim form or a person can enter data in multiple settings.

14. Click [Reimbursement](#) to open the form for additional changes.

Select Save to save your changes and return to this menu.

# Standard Budget Claim Form Guide – External Users

**Grant Tracking**

Claim: 5885XX## - 001 Grant Components

Grant: **5885XX##-TEST MIECHV Project**

Status: Editing

Program Area: Family Health

Grantee Organization: Test Company IDPH only

Program Manager: Stacey Hewitt

**Components** Preview Submit

Complete each component of the Claim and mark it as complete. Click Submit when you are done.

Name	Complete?	Last Edited
General Information	✓	08/08/2014
Reimbursement	✓	08/23/2014

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15. Click Preview to review the claim data as a single, flat copy.

**Claim Details**

**5885XX##-TEST MIECHV Project**

**Family Health**

Award Year: 2015 Status: Editing

Contract Number: 5885XX## Approved Date:

Claim Type: Reimbursement Paid Date:

Reporting Period: 08/08/2014 - 08/29/2014 Vendor Number:

Claim Number: 5885XX## - 001 Invoice Number:

Submitted By:

Submitted Date:

**Applicant and Organization**

**Applicant**

AnA User Id: BOF.TESTER@IOWAID

First Name\*: Bof Tester

First Name Middle Name Last Name

Title:

Email\*: [cheryl.christie@idph.iowa.gov](mailto:cheryl.christie@idph.iowa.gov)

Address\*: 111 Main

City\*: Anywhere Iowa 12345

City State/Province Postal Code/Zip

Phone\*: 111-222-3333

Phone Ext. City State/Province Postal Code/Zip

Program Area of Interest: Acute Disease Epidemiology Phone: 111.222.2222

**Organization Information**

Organization Name\*: Test Company IDPH only

Organization Type\*: Other

Tax ID:

DUNS:

Organization Website:

Address:

## Standard Budget Claim Form Guide – External Users

<b>Reimbursement</b>					
Budget Category	1 Approved Budget	2 Expenses This Period	3 Paid Claims	4 Total Claimed (All Statuses)	5 Unclaimed Balance (1-4)
<b>Salaries and Fringe/Benefits</b>					
CEO	\$11,400.00	\$100.00	\$0.00	\$100.00	\$11,300.00
CFO	\$5,600.00	\$0.00	\$0.00	\$0.00	\$5,600.00
Consultant	\$42,000.00	\$0.00	\$0.00	\$0.00	\$42,000.00
Consultant	\$32,000.00	\$0.00	\$0.00	\$0.00	\$32,000.00
Coordinator	\$60,000.00	\$500.00	\$0.00	\$500.00	\$59,500.00
<b>Subcontract</b>					
NA	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Equipment</b>					
None	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Other</b>					
Supplies	\$5,000.00	\$0.00	\$0.00	\$0.00	\$5,000.00
Travel	\$3,000.00	\$50.00	\$0.00	\$50.00	\$2,950.00
<b>Total:</b>	<b>\$159,000.00</b>	<b>\$650.00</b>	<b>\$0.00</b>	<b>\$650.00</b>	<b>\$158,350.00</b>

16. Select Back to return to previous screen.

iowaGrants.gov

Menu | Help | Log Out      Back | Print | Add | Delete | Edit | Save

**Grant Tracking**

Claim: 5885XX## - 001 Grant Components

Grant: 5885XX##-TEST MIECHV Project  
 Status: Editing  
 Program Area: Family Health  
 Grantee Organization: Test Company IDPH only  
 Program Manager: Stacey Hewitt

**Components** Preview **Submit**

Complete each component of the Claim and mark it as complete. Click Submit when you are done.

Name	Complete?	Last Edited
General Information		08/08/2014
Reimbursement	✓	08/23/2014

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If additional changes are needed, click [Reimbursement](#) to open the form. Select Save to save your changes and return to this menu.

17. Click the Submit button when all data has been entered into the claim form and verified.

## Standard Budget Claim Form Guide – External Users

The screenshot shows the Iowa Grants website interface. At the top, there is a header with the Iowa logo and the text "IowaGrants.gov". Below the header, there is a navigation bar with "Menu", "Help", and "Log Out" on the left, and "Back", "Print", "Add", "Delete", "Edit", and "Save" on the right. The main content area is titled "Grant Tracking" and displays the following information:

- Claim: 5885XX## - 001
- Grant: 5885XX##-TEST MIECHV Project
- Status: Editing
- Program Area: Family Health
- Grantee Organization: Test Company IDPH only
- Program Manager: Stacey Hewitt

Below this information is a "Components" section with a table:

Name	Complete
General Information	✓
Reimbursement	✓

A dialog box titled "Message from webpage" is overlaid on the right side of the screen. It contains the following text:

Submitting the Claim will lock all sections from further editing. Have you completed all sections? Are you sure you are ready to submit this Claim?

The dialog box has "OK" and "Cancel" buttons.

At the bottom of the page, there is a footer with "Iowa.gov – The Official Website of the State of Iowa." and "Dulles Technology Partners Inc."

A system message displays informing you that submitting the claim will lock all section for editing.

18. Click OK to continue submission of the claim. Click Cancel to return to previous screen.

The screenshot shows the Iowa Grants website interface. At the top, there is a header with the Iowa logo and the text "IowaGrants.gov". Below the header, there is a navigation bar with "Menu", "Help", and "Log Out" on the left, and "Back", "Print", "Add", "Delete", "Edit", and "Save" on the right. The main content area is titled "Claims" and displays the following information:

**Claim Submitted Confirmation**


You have successfully submitted your Claim numbered [001]. We have received your Claim for review.  
Click [here](#) to print claim.

At the bottom of the page, there is a footer with "Iowa.gov – The Official Website of the State of Iowa." and "Dulles Technology Partners Inc."

A system message displays “ You have successfully submitted a claim ###.”

You can always access the submitted claim information by returning to the Claim component in Grants and clicking on the claim number (see below).

# Standard Budget Claim Form Guide – External Users


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Menu | Help | Log Out
Back | Print | Add | Delete | Edit | Save

**Grant/Project Tracking**

**Grant/Project: 5885XX## - TEST MIECHV Project - 2015**

Status: Underway

Program Area: Family Health

Grantee Organization: Test Company IDPH only

Program Officer: Stacey Hewitt

Awarded Amount: \$159,000.00

Claims		<a href="#">Copy Existing Claim</a>   <a href="#">Return to Components</a>				
ID	Type	Status	Date Submitted	Date Paid	Date From-To	Claim Amount
5885XX## - 001	Reimbursement	Submitted	08/23/2014		08/08/2014 - 08/29/2014	\$650.00
5885XX## - 002	Reimbursement	Submitted	08/08/2014		08/08/2014 - 08/29/2014	\$3,000.00
5885XX## - 003	Reimbursement	Editing			08/13/2014 - 08/29/2014	\$200.00
5885XX## - 004	Reimbursement	Editing			08/13/2014 - 08/14/2014	\$100.00
5885XX## - 005	Reimbursement	Submitted	08/14/2014		08/01/2014 - 08/31/2014	\$5,000.00