FundingMT.org (WebGrants) FFY16-17 State Homeland Security Program (SHSP) claim reimbursement guide

Sign into FundingMT.org

To access your account, visit www.fundingmt.org. Some components of the system do not work well with the Google Chrome browser, it is advised that you use Mozilla Firefox or Internet Explorer.

Input your user ID and Password, then click ‘login’.

If you have forgotten your user name you can contact your Grant Program Manager at MT DES. If you forget your password, use the ‘forgot password’ link, MT DES staff cannot retrieve your password for you.

All users must have their own user name and password. Multiple users can be assigned to your grant, contact your Grant Program Manager at MT DES if you need assistance with registering users.
Once signed in to FundingMT.org, the main menu will appear:

Click on ‘My Grants’

A screen similar to the one below will appear:

Under the ‘title’ heading you may see one or multiple grants, depending on your jurisdiction. Click on the name of the grant that you’re working on. For this example we’ll be using the ‘TESTING Forms’ grant.
You should now see a screen similar to the one below:

To begin your claim, click the ‘Claims’ button.

You should now see a screen similar to the one below:

Though this test grant shows several previously existing claims, if this is your first claim for this grant, you won’t see anything listed under ‘ID’. To begin a new claim, click the ‘add’ button.
You should now see a screen similar to the one below:

For the field ‘Claim Type’, ensure that ‘Reimbursement’ is selected.

For the field ‘Report Period’, enter the dates of the quarter that you are reporting for.

The field ‘Final Request’ is not required and can be ignored.

Click ‘Save’ when finished.

You’ve now created a claim and are ready to edit the information in it.

You should see a screen similar to the one below.

Click ‘Return to Components’ to continue.
You should now see a screen that looks similar to the screen below. Note the column labeled ‘complete’, you’ll need to make sure that there’s a check mark next to each component before you can submit your claim.

You may already see a check mark next to the ‘General Information’ component, if you have that check mark you can skip this step and move on to page 7 of this guide. If you don’t have that check mark, click the blue words that say ‘General Information’.

You should now see a screen that looks similar to the screen below. Click on ‘edit’ to continue.
You should now see a screen that looks similar to the screen below.

Ensure that the ‘Claim Type’ field says ‘Reimbursement’.

Also ensure that the dates in the ‘Report Period’ field reflect the dates you are entering a claim for.

Click ‘Save’ to continue.

You should now see a screen that looks similar to the screen below.

Click on ‘Return to Components’ to continue.
You should now see a screen that looks similar to the screen below. You’re ready to move on to the next component, click on the blue word saying ‘Reimbursement’ to continue.

You should now see a screen that looks similar to the screen below. Remember that because this guide is using a test grant your budget will be different than what is shown here based on how you created your own unique budget in your original application. To proceed, simply enter any expenditures incurred next to the appropriate budget category in the area circled below. If you plan to submit multiple claims as your project progresses, you may not have expenditures in all categories right now.

When you’ve entered all of your expenditures, click ‘Save’ to continue.
You should now see a screen that looks similar to the screen below. Note the expenditures you just entered in the ‘Expenses This Period’ column shown in the circled area below.

Click ‘Mark as Complete’ to continue.

You should now be taken back to the ‘Components’ screen, which will look similar to the screen below.

You’re ready to move on to the next component, click on ‘Expenditure Documentation Upload’ to continue.
You should now see a screen similar to what is shown below. This section is where you will upload your general ledger to show proof of payment, as well as the accompanying invoices and/or receipts. To begin, click the ‘Add’ button.

![Grant Tracking](image1)

You should now see a screen that looks similar to what is shown below. Click the ‘Choose File’ button to continue.

![Attach File](image2)

You should now see a Windows Explorer pop up window that looks similar to what is shown below. Navigate through your computer to find the file you wish to upload, then double click on that file to upload it. For the purposes of this example we’ll use the document below labeled ‘Test document’

![Windows Explorer](image3)
You should now be taken back to the previous screen, which will look similar to what is shown below. Note that the file you just selected is showing in the ‘Upload File’ field.

To finish uploading this file, enter a brief description of what the file is, this will allow the grants staff to know what the document is before they open it, which can be helpful to us if you upload multiple documents. Note that in this example we’ve labeled the document ‘general ledger’

Once you enter a description, click ‘Save’ to continue.

Your screen should now look similar to what is shown below. If you have multiple files to attach, you can click the ‘Add’ button again and repeat the previous step.

When you’ve finished uploading files, click ‘Mark as Complete’ to continue.
You should now be taken back to the ‘Components’ page, which will look similar to what is shown below. You’re now ready to move on to the next component, click on ‘Equipment and Accountable Supplies’ to continue.

You should now see a screen that looks similar to what is shown below. You only need to complete this section if you have purchased any equipment (defined as any single item costing $5,000.00 or more). If this applies to you, click on ‘Edit’ to continue.

If you did not purchase any equipment for the period applying to this claim, click ‘Mark as Complete’ to continue.
If you clicked edit on the previous screen to add a listing of equipment, you should now see a screen similar to what is shown below. Fill in each section on the page below, click ‘Save’ when you are finished.

If you clicked Mark as Complete on the previous screen because you didn’t have any equipment to add, skip this section and move on to the next page.

You should now see a screen that looks similar to what is shown below. If you have additional equipment to report click the ‘Add’ button to repeat the previous step for each piece of equipment.

If you have no other equipment to report, click ‘Mark as Complete’ to continue.
You should now see a screen that looks similar to what is shown below. You’re ready to move on to the next component, click on ‘Certification-Applicant Agent’ to continue.

You should now see a screen that looks similar to what is shown below. Click ‘Edit’ to continue.
You should now see a screen that looks similar to what is shown below.

Click the ‘yes’ option under ‘Claim Certification’.

Type in your legal name in the ‘Signature of Applicant Agent’ field. Note that the applicant agent should have been previously identified on a form that came with your original award packet. The person identified on that form should be the person completing this claim.

Click ‘Save’ to continue.

You should now see a screen similar to what is shown below. Click ‘Mark as Complete’ to continue.
You should now see a screen that looks similar to what is shown below. Ensure that all of the components are marked as complete, as indicated by a check mark in the circled area below. If any components don’t have a check mark, enter back into that component to ensure that all required information is entered, then click ‘mark as complete’ within that component.

If all components have a check mark and you are satisfied with the information you entered, click ‘submit’.

Once you click ‘submit’, you should see a pop up window similar to what is shown below.

**Click ‘OK’ to continue.**

You should now see a screen similar to what is shown below. You are now finished submitting your claim.

The MT DES Grants Bureau staff will now review your claim and will contact you if they need any further information.