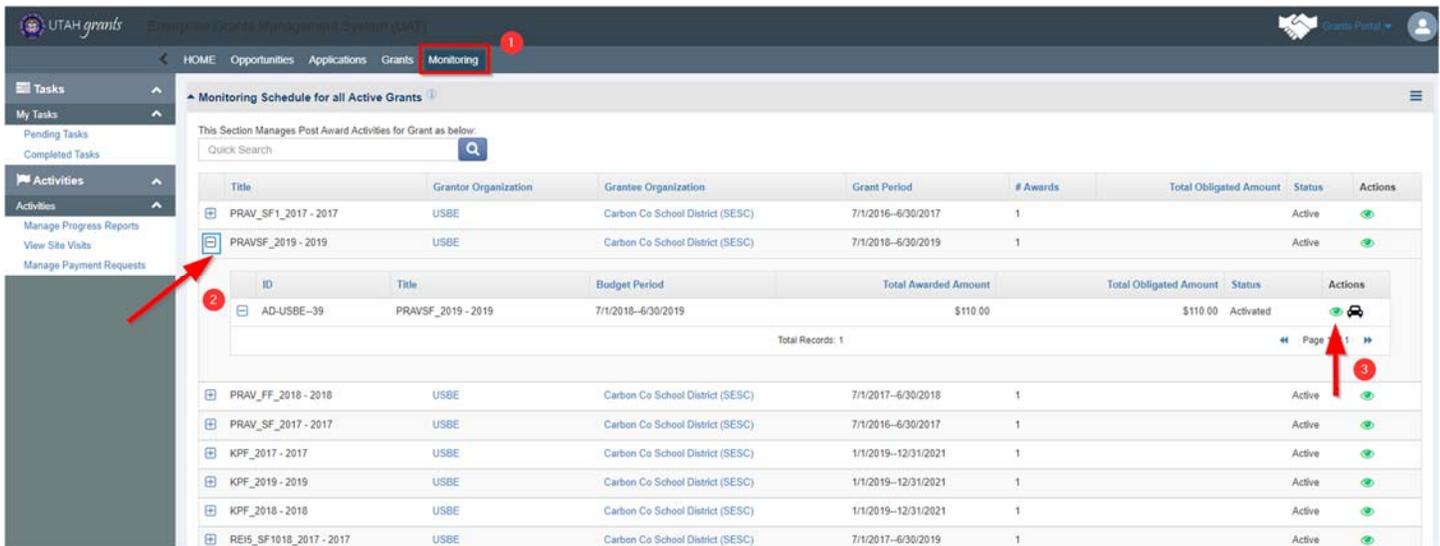


# Requesting Reimbursements in Utah Grants

Activities that occur after the award is issued are considered post-award activities. These are managed in the Monitoring section of Utah Grants.

## Payment Creator

1. Locate program for which reimbursement is being requested. Click the **Monitoring** tab (top Menu) and locate the program. Expand the **+** (plus sign) to view line details, click **green eye icon**.



Monitoring Schedule for all Active Grants

This Section Manages Post Award Activities for Grant as below:

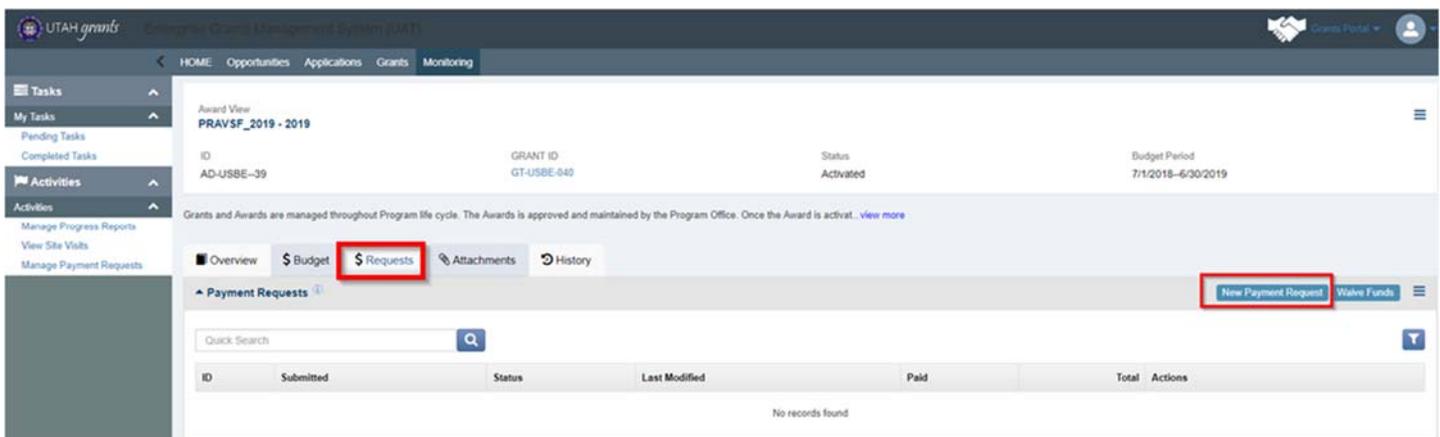
Title	Grantor Organization	Grantee Organization	Grant Period	# Awards	Total Obligated Amount	Status	Actions
+	PRAV_SF1_2017 - 2017	USBE	Carbon Co School District (SESC)	7/1/2016-6/30/2017	1	Active	
+	PRAVSF_2019 - 2019	USBE	Carbon Co School District (SESC)	7/1/2018-6/30/2019	1	Active	

ID	Title	Budget Period	Total Awarded Amount	Total Obligated Amount	Status	Actions
AD-USBE-39	PRAVSF_2019 - 2019	7/1/2018-6/30/2019	\$110.00	\$110.00	Activated	

Total Records: 1

2. Create New Payment Request by selecting the **\$ Requests** subtab, then selecting **New Payment Request**.



Award View: PRAVSF\_2019 - 2019

ID	GRANT ID	Status	Budget Period
AD-USBE-39	GT-USBE-640	Activated	7/1/2018-6/30/2019

Grants and Awards are managed throughout Program life cycle. The Awards is approved and maintained by the Program Office. Once the Award is activat...view more

Overview | **\$ Budget** | **\$ Requests** | Attachments | History

Payment Requests

**New Payment Request** | Waive Funds

ID	Submitted	Status	Last Modified	Paid	Total	Actions
No records found						

3. Enter General Information and **Save**.

- a. **Internal Invoice #** Organization self-generated invoice number
- b. **Internal Approver** Individual at organization assigned to approve this invoice (Utah Grants User with a role of Approver. Use magnifying glass to search)
- c. **Expense Fiscal Year** State Fiscal Year of when the expense was incurred (use magnifying Glass and select valid year). SFY begins July 1 and ends June 30 (e.g., SFY 2018 begins 07/01/2017 and ends 06/30/2018)
- d. **Expenses Incurred From** Start date of invoice period
- e. **Expenses Incurred Through** End date of invoice period

Create Payment Request Cancel **Save** 

Fields marked as \* are required

**Overview**

**General Information**

\*Internal Invoice#  ⓘ

Type  ⓘ

\*Internal Approver  ⓘ 

\*Fiscal Year Cost Rate  ⓘ

\*Expenses Incurred From  ⓘ

\*Expenses Incurred Through  ⓘ

**Grant Reference**

Grant  ⓘ

Award  ⓘ

Cancel Save

4. On **Financials** tab, click the **blue pen icon** next to the budget category to open allow for editing

Payment Request-TEST1 Submit Request Edit 

ID: PR-USBE-24 Program Name: PRAV\_SF\_2017 Project Period: 7/1/2016-6/30/2017 Status: Created

Invoice Period: 7/1/2016-6/30/2017

Created Submitted for Approval Submitted to Grantor Approved Paid

**Overview** **Financials** Attachments History

**Budget Period Amounts**

Total Awarded Amount: \$110 Requested Amount this Action: \$20 YTD Reimbursement Paid: \$0

Indirect Cost Type: Restricted Indirect Cost %: 0%

**Reimbursement Grid - USBE** Print Budget 

Category Name	Total Budget	Total Grant Expenditure	Fiscal YTD Expenditure	Approved	Remaining Balance	This Request	Actions
Salaries (100)	\$10.00	\$0.00	\$0.00	\$0.00	\$10.00	\$11.00	 
Employee Benefits (200)	\$10.00	\$0.00	\$0.00	\$0.00	\$10.00	\$0.00	
Purchased Professional & Tech Serv...	\$10.00	\$0.00	\$0.00	\$0.00	\$10.00	\$0.00	
Purchased Property Services (400)	\$10.00	\$0.00	\$0.00	\$0.00	\$10.00	\$0.00	

5. Enter values and **Save**

▲ Reimbursement Grid - USBE Print Budget **Save**

Category Name	Total Budget	Total Grant Expenditure	Fiscal YTD Expenditure	Approved	Remaining Balance	This Request	Actions
Salaries (100)	\$500,000.00	\$0.00	\$0.00	\$0.00	\$500,000.00	<input type="text" value="5000"/>	↻
Employee Benefits (200)	\$100,000.00	\$0.00	\$0.00	\$0.00	\$100,000.00	<input type="text" value="1000"/>	↻
Purchased Professional ...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	✎
Purchased Property Serv...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	✎
Other Purchased Service...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	✎
Travel (580)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	✎
Supplies and Materials (6...	\$22,139.37	\$0.00	\$0.00	\$0.00	\$22,139.37	<input type="text" value="3542"/>	↻
Property Including Equip...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	✎
Other (Not eligible for Ind...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	✎
Indirect Cost	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	

6. After saving, indirect costs will calculate automatically based on the fiscal year and periods entered (if indirect costs are applicable). Check calculations and totals.

Other Purchased Services (500)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	✎
Travel (580)	\$20.00	\$0.00	\$0.00	\$0.00	\$0.00	\$20.00	\$0.00	✎
Supplies and Materials (600)	\$10.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10.00	\$0.00	✎
Property Including Equipment (700)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	✎
Other (Not eligible for Indirect Cost) (...)	\$29.91	\$0.00	\$0.00	\$0.00	\$0.00	\$29.91	\$0.00	✎
Indirect Cost	\$0.09	\$0.00	\$0.00	\$0.00	\$0.00	\$0.09	\$0.02	✎

Total Records: 10

▲ Reimbursement Grid Totals

Total Budget	Total Grant Expenditure	Fiscal YTD Expenditure
\$90	\$0	\$0
Approved	Remaining Balance	This Request
\$0	\$90	\$11.02

▲ Payment Requests 1

Quick Search

ID	Submitted	Status	Last Modified	Total	Paid	Actions
PR-USBE-23		Created	10/19/2018 9:42 AM	\$11.02		👁

Total Records: 1

Submit Request Edit

7. On Attachments tab, click **Add** to include supporting documentation, if required.

Payment Request-BW Test #1 Cancel Save

ID: PR-USBE-00 Project Period: 7/1/2018-6/30/2019 Status: Created Invoice Period: 7/1/2018-7/30/2018

Overview **Financials** **Attachments**

Attachment Add

Name	Type	Description	Date	Actions

**Add Attachments** ×

Upload file from Computer Add

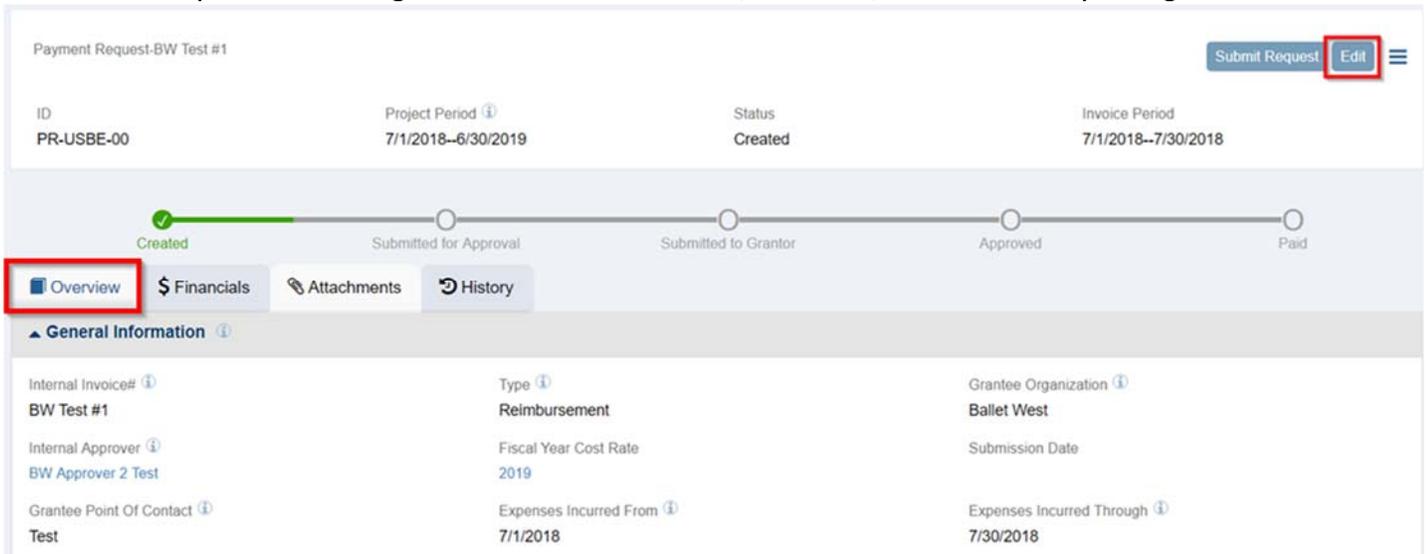
\*Type: Invoice

\*File: Choose File | No file chosen

\*Description:

Cancel Save

8. If it is necessary to make changes to information entered, Click **Edit**, make necessary changes and **Save**.



Payment Request-BW Test #1

Submit Request Edit

ID PR-USBE-00 Project Period 7/1/2018-6/30/2019 Status Created Invoice Period 7/1/2018-7/30/2018

Created Submitted for Approval Submitted to Grantor Approved Paid

Overview Financials Attachments History

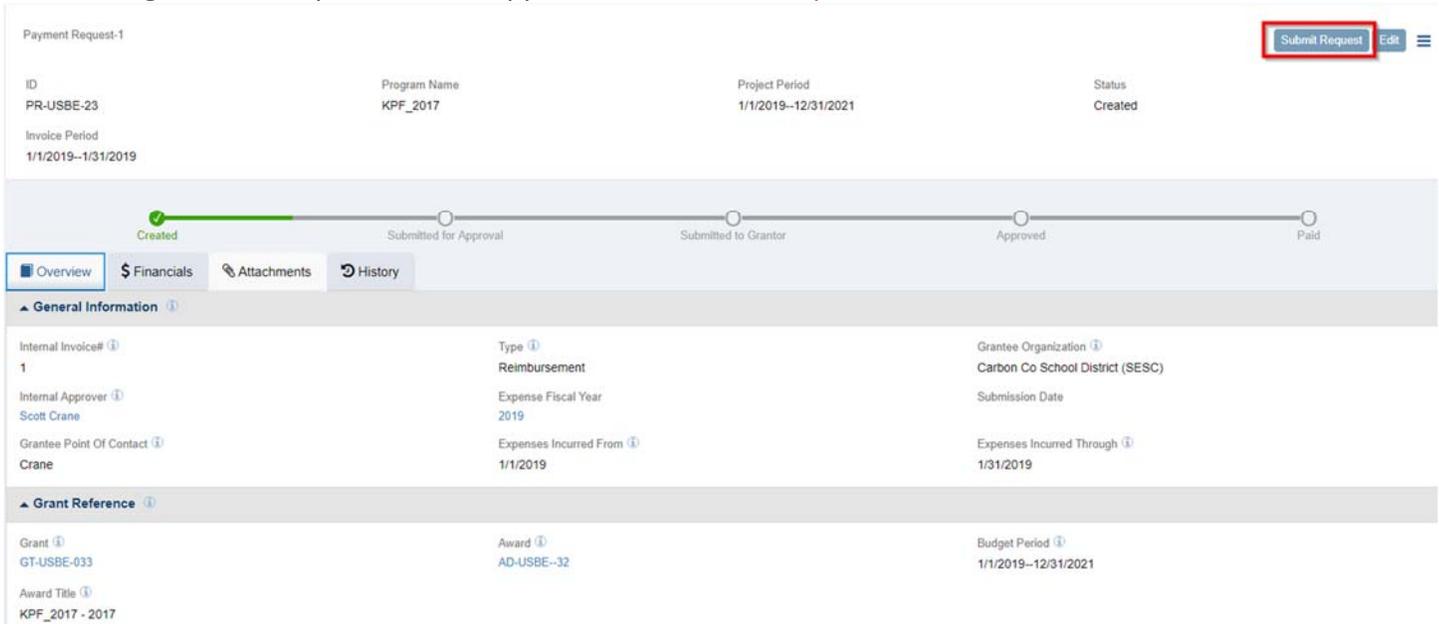
**General Information**

Internal Invoice# BW Test #1 Type Reimbursement Grantee Organization Ballet West

Internal Approver BW Approver 2 Test Fiscal Year Cost Rate 2019 Submission Date

Grantee Point Of Contact Test Expenses Incurred From 7/1/2018 Expenses Incurred Through 7/30/2018

9. After saving, Submit Request box will appear. Click **Submit Request**



Payment Request-1

Submit Request Edit

ID PR-USBE-23 Program Name KPF\_2017 Project Period 1/1/2019-12/31/2021 Status Created

Invoice Period 1/1/2019-1/31/2019

Created Submitted for Approval Submitted to Grantor Approved Paid

Overview Financials Attachments History

**General Information**

Internal Invoice# 1 Type Reimbursement Grantee Organization Carbon Co School District (SESC)

Internal Approver Scott Crane Expense Fiscal Year 2019 Submission Date

Grantee Point Of Contact Crane Expenses Incurred From 1/1/2019 Expenses Incurred Through 1/31/2019

**Grant Reference**

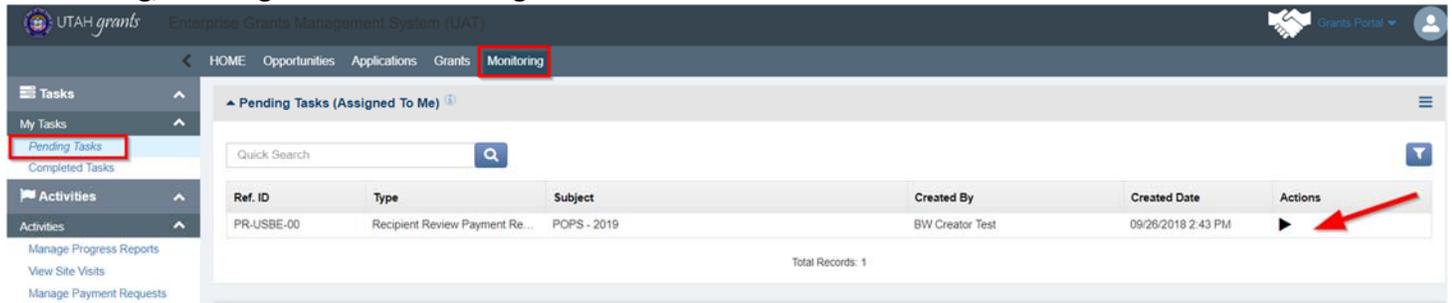
Grant GT-USBE-033 Award AD-USBE-32 Budget Period 1/1/2019-12/31/2021

Award Title KPF\_2017 - 2017

# Internal Approver

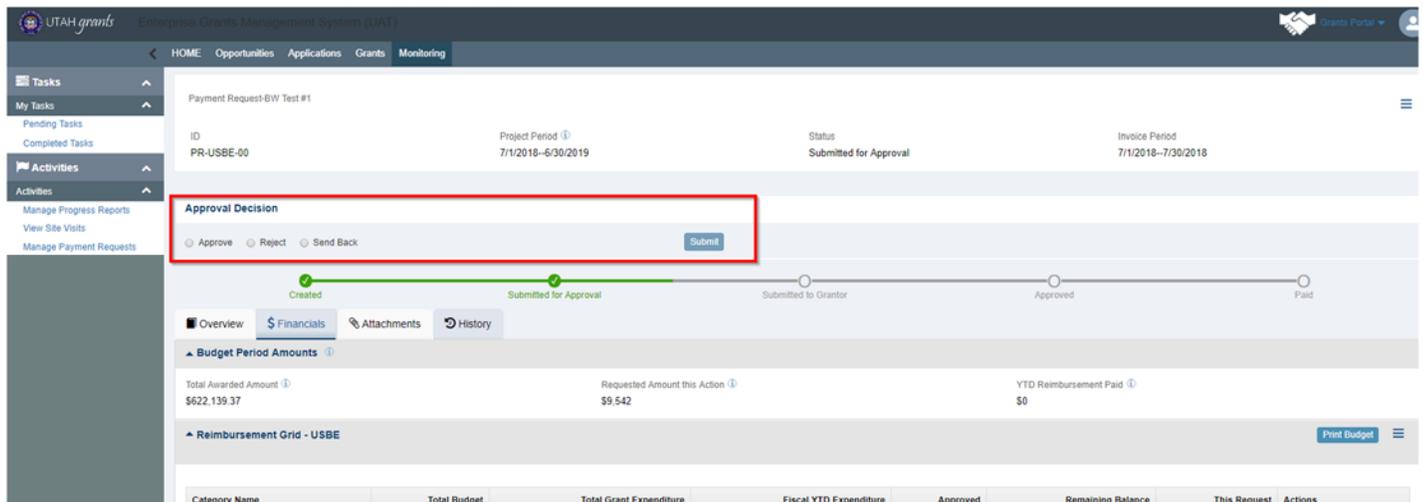
10. Internal Approver will receive an email with a link to the reimbursement request.

The Internal Approver can also locate the reimbursement request pending their approval by clicking on Monitoring, Pending Tasks and selecting the task.

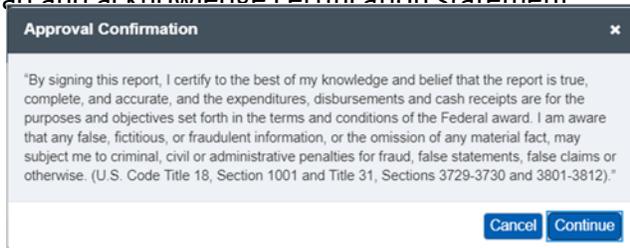


11. Internal Approver reviews information on all tabs and selects the necessary action. A comments box appears and is required. Click **Submit**

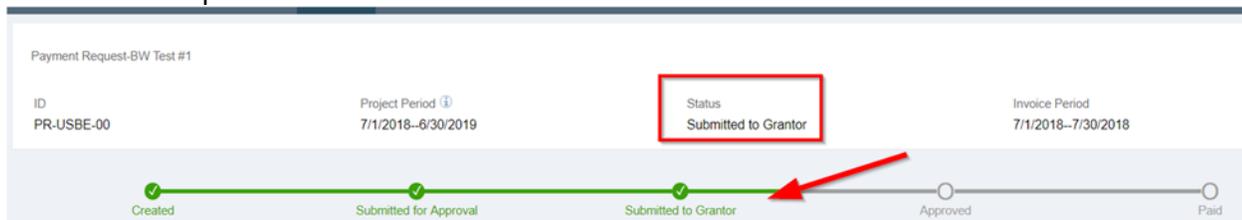
- a. Approve Sends application to USBE for approval and payment
- b. Reject Cancels the reimbursement request. A new payment request will need to be created.
- c. Send Back Sends the reimbursement request back to the creator for editing and resubmission



12. Read and acknowledge certification statement



13. Status is now updated to Submitted to Grantor



## 14. An existing payment request is already in progress

Reimbursement requests must be fully approved (Internal Approver through USBE Approval) before a new reimbursement request can be submitted.

**Award View**  
PRAY\_SF\_2017 - 2017

ID: AD-USBE--40      GRANT ID: GT-USBE-041      Status: Activated      Budget Period: 7/1/2016--6/30/2017

Grants and Awards are managed throughout Program life cycle. The Awards is approved and maintained by the Program Office. Once the Award is activat...view more

Overview | Budget | **Requests** | Attachments | History

An existing payment request is already in progress

Payment Requests New Payment Request Waive Funds

Quick Search

ID	Submitted	Status	Last Modified	Paid	Total	Actions
PR-USBE-24		Submitted for Approval	10/19/2018 5:52 PM		\$20.00	

Total Records: 1

## 15. Requested amount cannot exceed 10% of approved category Budget

Reimbursement requests are compared to the last approved budget. Requests can exceed the approved budget by no more than 10%. Budget categories that do not exist on the budget cannot be requested on the reimbursement.

Created      Submitted for Approval      Submitted to Grantor      Approved      Paid

Overview | **Financials** | Attachments | History

Budget Period Amounts

Total Awarded Amount	Requested Amount this Action	YTD Reimbursement Paid
\$622,139.37	\$9,542	\$0

Indirect Cost Type: N/A      Indirect Cost %: 0%

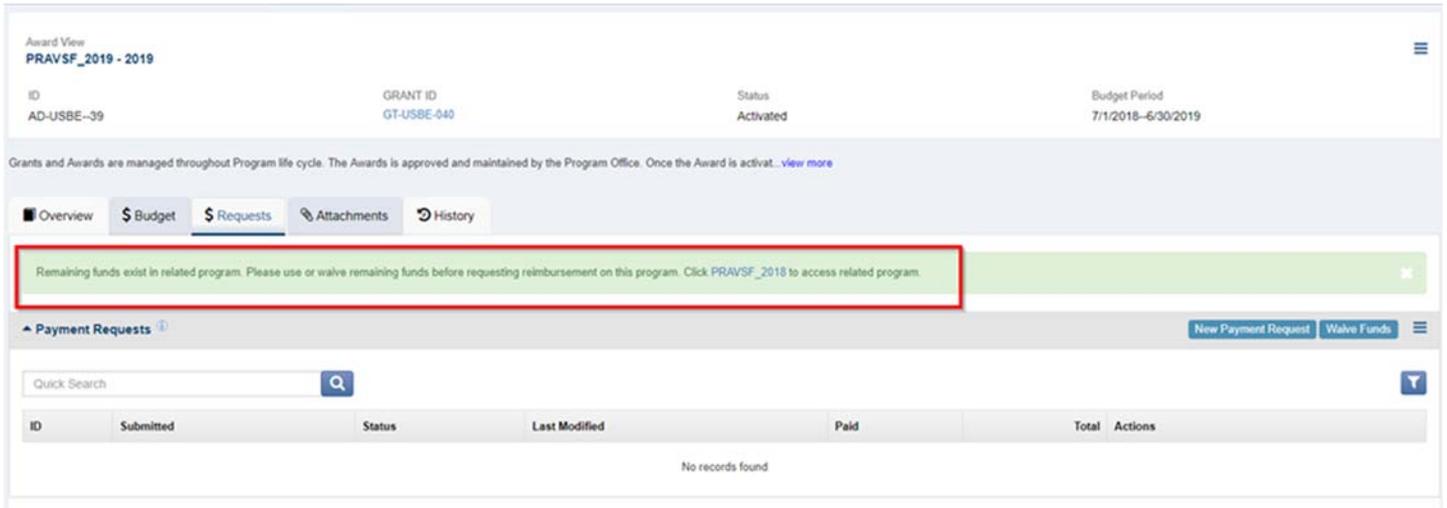
Reimbursement Grid - USBE Print Budget Save

Requested amount cannot exceed 10% of approved category budget

Category Name	Total Budget	Total Grant Expenditure	Fiscal YTD Expenditure	Approved	Remaining Balance	This Request	Actions
Salaries (100)	\$500,000.00	\$0.00	\$0.00	\$0.00	\$500,000.00	600000	
Employee Benefits (200)	\$100,000.00	\$0.00	\$0.00	\$0.00	\$100,000.00	\$1,000.00	
Purchased Professional &...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	

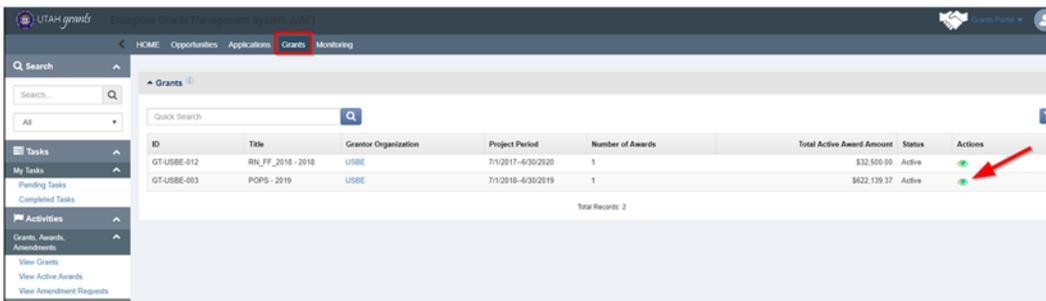
**16. Remaining funds exist in a related program. Please use the waive remaining funds before requesting reimbursement on this program. Click here to access related program.**

Programs from the same funding source but different fiscal years are considered to be related programs. For example, FY17 Title I, FY18 Title I and FY19 Title I are all considered to be related programs. Recipient must fully utilize or waive funds in the earliest related program prior to requesting funds on a later program. Request or waive funds on earlier program before proceeding.



**Alternate Navigation Option**

**17. Payment requests can also be located by clicking on Grants (top menu), selecting the appropriate program by clicking on the green eye icon.**



Click on the Awards sub-tab, then green eye icon.

