

## WSDOT – Public Transportation Division

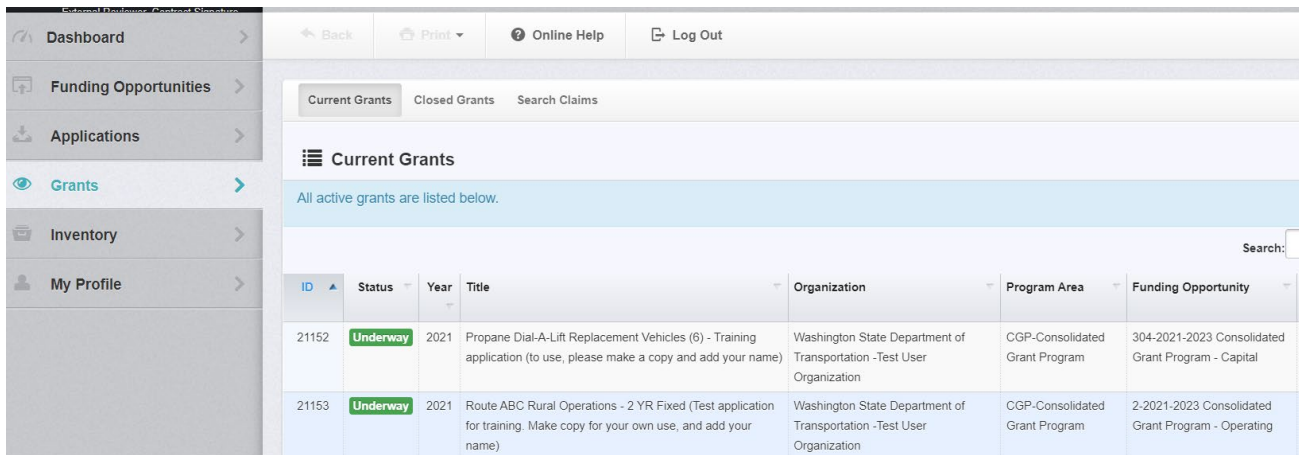
### TDM/CTR Claims Reimbursements in GMS

Log into the WSDOT Grants Management System (GMS) at: <https://wsdot.ptd.webgrantscloud.com/index.do>.

#### CREATING A CLAIM

Once logged into GMS, click on the Grants tab on the left side menu. Active grants will be listed. Select the grant to receive the claim reimbursement request.

***Please note: Claim forms will be different depending on the type of project. Following are instructions for operating, planning, and mobility management grants that use the same claim forms. A separate section explains completing claim forms for construction grants. Separate instructions will be provided for capital grants claim reimbursements.***



ID	Status	Year	Title	Organization	Program Area	Funding Opportunity
21152	Underway	2021	Propane Dial-A-Lift Replacement Vehicles (6) - Training application (to use, please make a copy and add your name)	Washington State Department of Transportation -Test User Organization	CGP-Consolidated Grant Program	304-2021-2023 Consolidated Grant Program - Capital
21153	Underway	2021	Route ABC Rural Operations - 2 YR Fixed (Test application for training. Make copy for your own use, and add your name)	Washington State Department of Transportation -Test User Organization	CGP-Consolidated Grant Program	2-2021-2023 Consolidated Grant Program - Operating

Once the grant is open, click on “Claims” from the Component list.



Component
General Information
Claims
Status Reports
Executed Agreements, Amendments & Work Plans
Appropriations
Contract Amendments

To add a claim, click on the green “+Add Claim” button on the right.

Grant List

Genera

Claims

Status

Contra

Approp

Contra

Corres

Other

Scope

Budget

Closeo

0

Claims

Notes (0)

Add Claim

ID	Type	Status	Reporting Period	Submitted Date	Paid Date	Claim Amount
11343-TDM/CTR Test Grant - 001	Reimbursement	Approved	08/01/2021 - 08/31/2021	Nov 2, 2021 9:33 AM		\$50.00
11343-TDM/CTR Test Grant - 002	Reimbursement	Editing	09/01/2021 - 09/30/2021			\$0.00
11343-TDM/CTR Test Grant - 003	Reimbursement	Submitted	10/01/2021 - 10/31/2021	Nov 3, 2021 3:04 PM		\$100.00

After clicking on the “+Add Claim” button, the General information form will appear. Fields appearing in red are required fields and cannot be left blank.

Status: – This field will populate once the General Information form is saved.

Type: - Select Reimbursement.

Reporting Period: - Enter the month or quarter, using dates, for which reimbursement is requested (i.e. 1/1/2021 to 1/31/2021 for month or 1/1/2021 to 3/31/2021 for quarterly).

Final request – Select “No” unless this is the last claim request for this grant, then select “Yes”.

Click on the “Save Form” button.

Dashboard
Funding Opportunities
Applications
Grants
Inventory
My Profile

Back
Print
Online Help
Log Out

General Information - Claim - Edit

Save Form

In the form below, complete all required fields. Enter 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, then the Final Request checkbox should be checked.

Status\*

Type\*: Reimbursement

Report Period:

Start Date

End Date

Final Request?\*: Yes No

A list of forms appears under the Components list. Forms must be completed, save, and marked as complete before the claim can be submitted. Forms can be edited and saved until the claim is submitted.

The warning in red below shows the claim cannot be submitted because the components (forms) are not complete.

Claim Preview
Alert History
Map
Versions

**Claim Details**

Claim cannot be Submitted Currently

- Claim components are not complete

Component	Complete?
General Information	✓
Reimbursement	
Description of Expenses	

## COMPLETING CLAIM FORMS

### **General Information Form**

The general information form was completed at the time the user clicked on “Add Claim”.

### **Description of Expenses Form**

Click on the form and follow the directions shown in blue sections to complete required information.

**Expenses** Save Form

Please use the text box below to provide expense detail based on category of project work. Here is an example:

1. Program administration: \$2000 (e.g. staff time)
2. Employer program development, engagement and marketing: \$3000 (e.g. marketing materials, room rental for event, staff time)
3. Program measurement and reporting: \$3000 (e.g. staff time)
4. Incentives: \$500 (e.g. gift cards)
5. Other:

**Detail of Expenses\*:**

\$60 - administration  
\$40 - guaranteed ride home

Additional information is optional. Add attachments if needed for additional explanation of expenses by clicking on the “Add New Attachment” button.

**Supporting Documentation - Other Attachments** Mark as Complete Add from Doc Repository Add New Attachment

Description	File Name <a href="#">🔗</a>	Type	Size	Upload Date	Delete
No files attached.					

Add the attachment, provide a brief description, then click on the “Save File” button. This step is required for each attachment.

**Attach File** Save File Cancel

**Upload File\*:**  Select file

**Description\*:**

500 character(s) left

After completing expenses and adding attachments, click on the “Save Form” button.

Once the form is saved, click on the “Mark as Complete” button at the top of the form. If changes are required, click on the edit form, make changes, then save the form again before clicking on the “Mark as Complete” button.

Expenses

✓ Mark as Complete

✎ Edit Form

Please use the text box below to provide expense detail based on category of project work. Here is an example:

1. Program administration: \$2000 (e.g. staff time)

2. Employer program development, engagement and marketing: \$3000 (e.g. marketing materials, room rental for event, staff time)

3. Program measurement and reporting: \$3000 (e.g. staff time)

4. Incentives: \$500 (e.g. gift cards)

5. Other:

Detail of Expenses\*:

\$60 - administration \$40 - guaranteed ride home

## Reimbursement Form

To add reimbursement expense request amounts to this form, click on the “Edit Reimbursement” button first.

Reimbursement								<a href="#">Edit Reimbursement</a>	
Budget Category	Details	Contract Budget	Amount Requested This Period	Amount Reimbursed To Date	Total	Available Balance (Unpaid)	Prior Requested Amount (Submitted Not Paid)	Total Claimed	Remaining Balance (Unclaimed)
Expenses									
Administration	Administration	\$400.00	\$0.00	\$0.00	\$0.00	\$400.00	\$50.00	\$50.00	\$350.00
Guaranteed Ride Home	Guaranteed Ride Home	\$100.00	\$0.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00	\$100.00
		\$500.00	\$0.00	\$0.00	\$0.00	\$500.00	\$50.00	\$50.00	\$450.00

Add the dollar amounts for each category listed in the *Description of Expenses* form, which also should match the budget form categories. Click the “Save Reimbursement” button after adding amounts requested this period.

<div> <div> <div></div> <div>Reimbursement - Edit</div> </div> <div>Save Reimbursement</div> </div>									
Budget Category	Details	Contract Budget	Amount Requested This Period	Amount Reimbursed To Date	Total	Available Balance (Unpaid)	Prior Requested Amount (Submitted Not Paid)	Total Claimed	Remaining Balance (Unclaimed)
Expenses									
Administration	Administration	\$400.00	60.00	\$0.00	\$0.00	\$400.00	\$50.00	\$50.00	\$350.00
Guaranteed Ride Home	Guaranteed Ride Home	\$100.00	40.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00	\$100.00
		\$500.00	\$0.00	\$0.00	\$0.00	\$500.00	\$50.00	\$50.00	\$450.00

Click on the “Mark as Complete” button once amounts are verified as correct and matching *Description of Expenses* form.

Reimbursement							✓ Mark as Complete	✎ Edit Reimbursement	
Budget Category	Details	Contract Budget	Amount Requested This Period	Amount Reimbursed To Date	Total	Available Balance (Unpaid)	Prior Requested Amount (Submitted Not Paid)	Total Claimed	Remaining Balance (Unclaimed)
Expenses									
Administration	Administration	\$400.00	\$60.00	\$0.00	\$60.00	\$340.00	\$50.00	\$110.00	\$290.00
Guaranteed Ride Home	Guaranteed Ride Home	\$100.00	\$40.00	\$0.00	\$40.00	\$60.00	\$0.00	\$40.00	\$60.00
		\$500.00	\$100.00	\$0.00	\$100.00	\$400.00	\$50.00	\$150.00	\$350.00

Once all forms have been completed and have a green check mark, the claim is ready for submittal. The message “Claim is in compliance and is ready for Submission” should also show in a green ribbon.

Claim Preview
Alert History
Map
Versions

Claim Details

✓ Submit Claim
Notes (0)
Feedback
Preview Claim

- Claim is in compliance and is ready for Submission!

Component	Complete?	Last Edited
General Information	✓	Nov 3, 2021 2:49 PM - Cheryl Steben
Description of Expenses	✓	Nov 3, 2021 2:51 PM - Cheryl Steben
Reimbursement	✓	Nov 3, 2021 2:58 PM - Cheryl Steben

The claim can be previewed before submitting the claim to verify all information is accurate and complete. Clicking the “Preview Claim” button shows the claim forms in an Adobe type PDF format so that all information can be viewed without clicking on each form. To exit preview, click on the “Edit Claim” button to go back to the claim details screen.

Corrections can be made to any forms that have been completed until the claim is submitted. If errors are found, or changes need to be made, click on the required form, and click on the edit button. Make changes, save, and mark as complete again.

## SUBMITTING A CLAIM

To submit the claim, click on the orange “Submit Claim” button.

Claim Preview
Alert History
Map
Versions

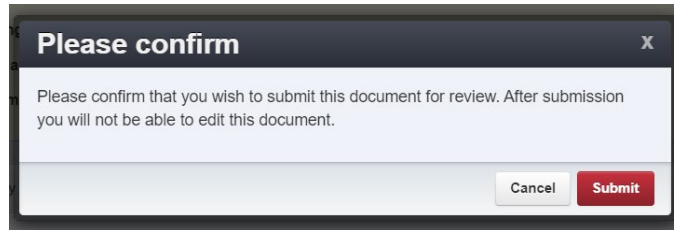
Claim Details

✓ Submit Claim
Notes (0)
Feedback
Preview Claim

- Claim is in compliance and is ready for Submission!

Component	Complete?	Last Edited
General Information	✓	Nov 3, 2021 2:49 PM - Cheryl Steben
Description of Expenses	✓	Nov 3, 2021 2:51 PM - Cheryl Steben
Reimbursement	✓	Nov 3, 2021 2:58 PM - Cheryl Steben

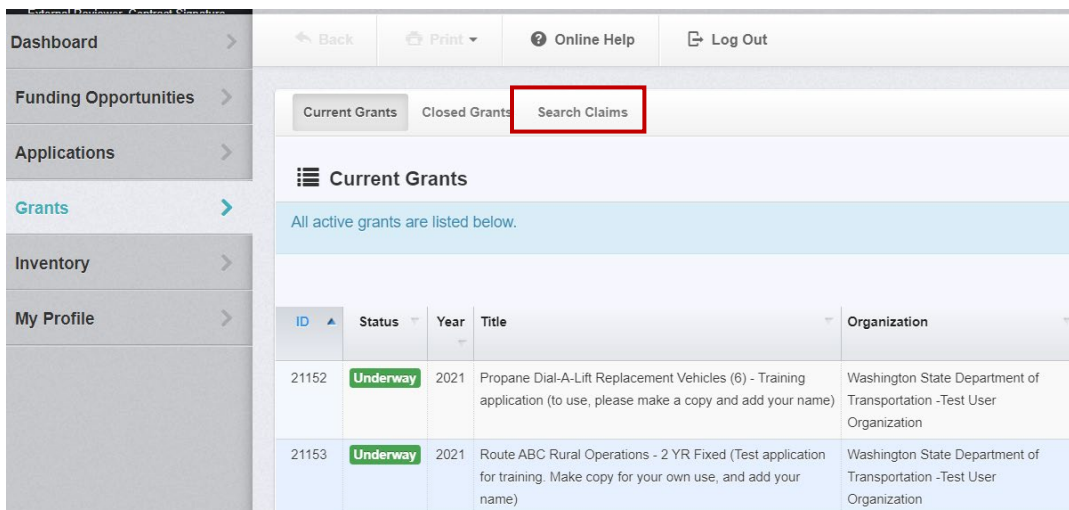
A dialog box will appear confirming submittal of claim. Once the “Submit” button is selected, edits to the claim will no longer be allowed by the grantee.



WSDOT will be notified once the claim has been submitted. Warrants (payments) and electronic funds transfers will be processed outside of GMS at this time. However, payment status of claims is available in GMS.

### VIEWING CLAIMS AND CLAIMS STATUSES

To view claims, click on “Grants” on the left menu then select the “Search Claims” tab.



Claims can be searched by filters, which is helpful when there are many grants. Claims can be searched without filters by clicking on the “Search Claim” button on the right of the screen.

Using the Grant Number filter, a list of claims associated to the grant is now listed. This list shows claim numbers, status, and amount in addition to other fields. This list can be sorted by any column header by clicking on it.



Claim Number ▲	Type ▼	Status ▼	Submit Date ▼	Paid Date ▼	Grant Title ▼	Organization ▼	Program Officer ▼	Program Area ▼	Funding Opportunity ▼	Approval Level ▼	Amount ▼
11343-TDM/CTR Test Grant-001	Reimbursement	Approved	Nov 2, 2021 9:33 AM		Test Grant for changes	Washington State Department of Transportation -Test User Organization	Lori Barnhart	TDM/CTR	2988-2021-2023 TDM / CTR Grant Program	3	\$50.00
11343-TDM/CTR Test Grant-002	Reimbursement	Editing			Test Grant for changes	Washington State Department of Transportation -Test User Organization	Lori Barnhart	TDM/CTR	2988-2021-2023 TDM / CTR Grant Program	0	\$0.00
11343-TDM/CTR Test Grant-003	Reimbursement	Submitted	Nov 3, 2021 3:04 PM		Test Grant for changes	Washington State Department of Transportation -Test User Organization	Lori Barnhart	TDM/CTR	2988-2021-2023 TDM / CTR Grant Program	0	\$100.00

To see additional details about a claim, click on the claim row.

## 11343-TDM/CTR Test Grant - Test Grant for changes - 2021

### Claim Details

<b>Funding Opportunity:</b>	2988-2021-2023 TDM / CTR Grant Program	<b>Initial Submit Date:</b>	Nov 2, 2021 9:33 AM
<b>Program Area:</b>	TDM/CTR	<b>Initially Submitted By:</b>	Cherryl Steben
<b>Status:</b>	Approved	<b>Last Submit Date:</b>	
<b>Claim Number:</b>	001	<b>Last Submitted By:</b>	
<b>Claim Type:</b>	Reimbursement	<b>Approved Date:</b>	Nov 2, 2021 9:35 AM
<b>Reporting Period:</b>	08/01/2021 - 08/31/2021	<b>Approved By:</b>	Cherryl Steben
<b>Final Request:</b>	No		
<b>Vendor Number:</b>			
<b>Check Number:</b>			
<b>Paid Date:</b>			

Claims can also be accessed by clicking on a current grant and selecting the “Claims” component. Viewing claims from the grant will show the submitted date, paid date, and claim amount paid without clicking on the claim.

Grant List	Genera	Claims	Status	Contra	Approp	Contra	Corres	Other	Scope	Budget	Closeo
<div> <b>Claims</b> <div> Notes (0) Add Claim </div> </div>											
ID ▲	Type ▼	Status ▼	Reporting Period ▼	Submitted Date ▼	Paid Date ▼	Claim Amount ▼					
11343-TDM/CTR Test Grant - 001	Reimbursement	Approved	08/01/2021 - 08/31/2021	Nov 2, 2021 9:33 AM		\$50.00					
11343-TDM/CTR Test Grant - 002	Reimbursement	Editing	09/01/2021 - 09/30/2021			\$0.00					
11343-TDM/CTR Test Grant - 003	Reimbursement	Submitted	10/01/2021 - 10/31/2021	Nov 3, 2021 3:04 PM		\$100.00					
						<b>Submitted Amount:</b>					
						<b>Approved Amount:</b>					
						<b>Paid Amount:</b>					
						<b>Total Amount:</b>					

### CLAIM CORRECTIONS

If a claim is incomplete or incorrect, it will be returned for additional information and/or corrections. Grantees will receive an email and a system alert that the claim status has changed from “Submitted” to “Correcting”. The Claim should appear in the Recent Negotiations section of the Work Assignment screen.

Recent Negotiations - Due Within 30 Days								
This section displays the documents that you negotiated in the last 30 days.								
Due Date	Document Type	Sub Type/Round	ID	Status	Title	Organization	Program Area	Funding Opportunity
11/04/2021	Claim	Reimbursement	11343-TDM/CTR Test Grant-003	Correcting	Test Grant for changes	Washington State Department of Transportation -Test User Organization	TDM/CTR	2988-2021-2023 TDM / CTR Grant Program

The claim can be accessed by clicking on it in the recent negotiations section as well as going to the grant and clicking on Claims in the grant component list.

Click on the Alert History tab to see the message for changes required. This step isn’t necessary if instructions for corrections is already known (i.e. email message read when received).

Claim Preview
Alert History
Map
Versions

Claim Details
Withdraw
Notes (0)
Feedback
Edit Claim

### 11343-TDM/CTR Test Grant - Test Grant for changes - 2021

#### Claim Details

<b>Funding Opportunity:</b>	2988-2021-2023 TDM / CTR Grant Program	<b>Initial Submit Date:</b>	Nov 3, 2021 3:04 PM
<b>Program Area:</b>	TDM/CTR	<b>Initially Submitted By:</b>	Cherryl Steben
<b>Status:</b>	Correcting	<b>Last Submit Date:</b>	
<b>Claim Number:</b>	003	<b>Last Submitted By:</b>	
<b>Claim Type:</b>	Reimbursement	<b>Approved Date:</b>	
<b>Reporting Period:</b>	10/01/2021 - 10/31/2021	<b>Approved By:</b>	
<b>Final Request:</b>	No		

The latest alert will be at the top of the alert list. Below is the message contained in the alert.

You are requested to resubmit the claim by 11/04/2021.

Comments appear below:

**Please add additional documentation in the attachment section of the Description of Expenses form and return by 11/4/2021.**

Click on the back button (in the grant, not the browser back button) to return to the claim. Click on the “Edit Claim” button to see the form(s) that need to be completed. The *Description of Expenses* form needs to be completed as there is no checkmark on the “Complete?” column.



Claim Preview
Alert History
Map
Versions

**Claim Details**
✕ Withdraw
📝 Notes (0)
💬 Feedback
🔍 Preview Claim

**Claim cannot be Submitted Currently**

- Claim components are not complete

Component	Complete?	Last Edited
General Information	✓	Nov 3, 2021 2:49 PM - Cheryl Steben
Description of Expenses		Nov 3, 2021 2:51 PM - Cheryl Steben
Reimbursement	✓	Nov 3, 2021 2:58 PM - Cheryl Steben

Complete form(s) as directed in the alert message received. Click on the “Save Form” button and then click on the “Mark as Complete” button. The claim is now ready to submit again.

Click on the “Submit Claim” button.

Claim Preview
Alert History
Map
Versions

**Claim Details**
✓ Submit Claim
✕ Withdraw
📝 Notes (0)

- Claim is in compliance and is ready for Submission!

Component	Complete?	Last Edited
General Information	✓	Nov 3, 2021 2:49 PM - Cheryl Steben
Description of Expenses	✓	Nov 3, 2021 2:51 PM - Cheryl Steben
Reimbursement	✓	Nov 3, 2021 2:58 PM - Cheryl Steben

The claim will now be in “submitted” status rather than “correcting” status.

## Need assistance?

For help with claims status or payments, send an email to [PTDinvoices@wsdot.wa.gov](mailto:PTDinvoices@wsdot.wa.gov) or call 306-705-7386.

For technical assistance with the Grants Management System, send an email to [PTDGMSsupport@wsdot.wa.gov](mailto:PTDGMSsupport@wsdot.wa.gov) or call 360-705-7711.