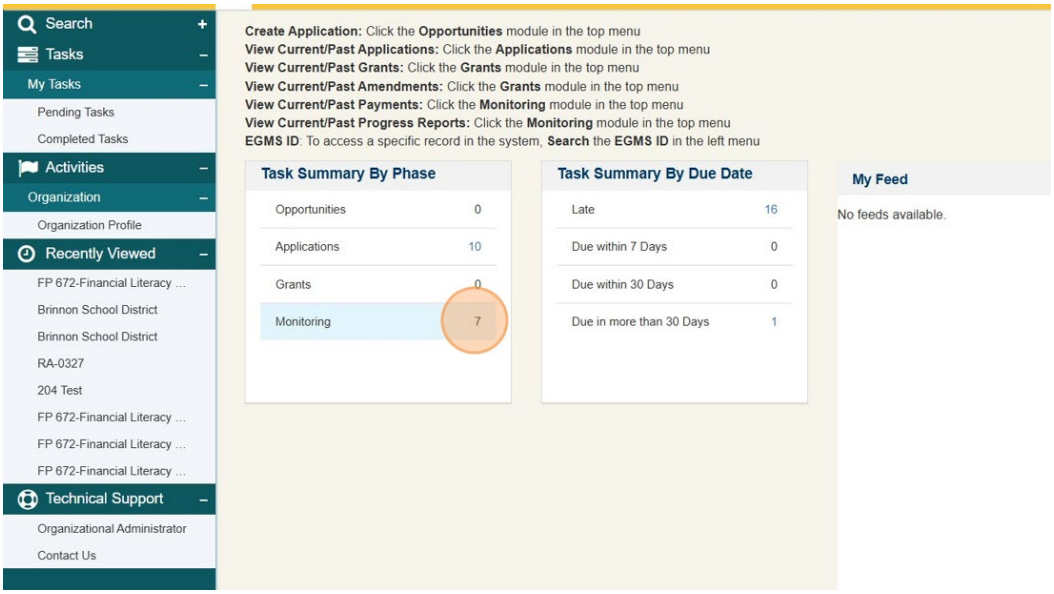
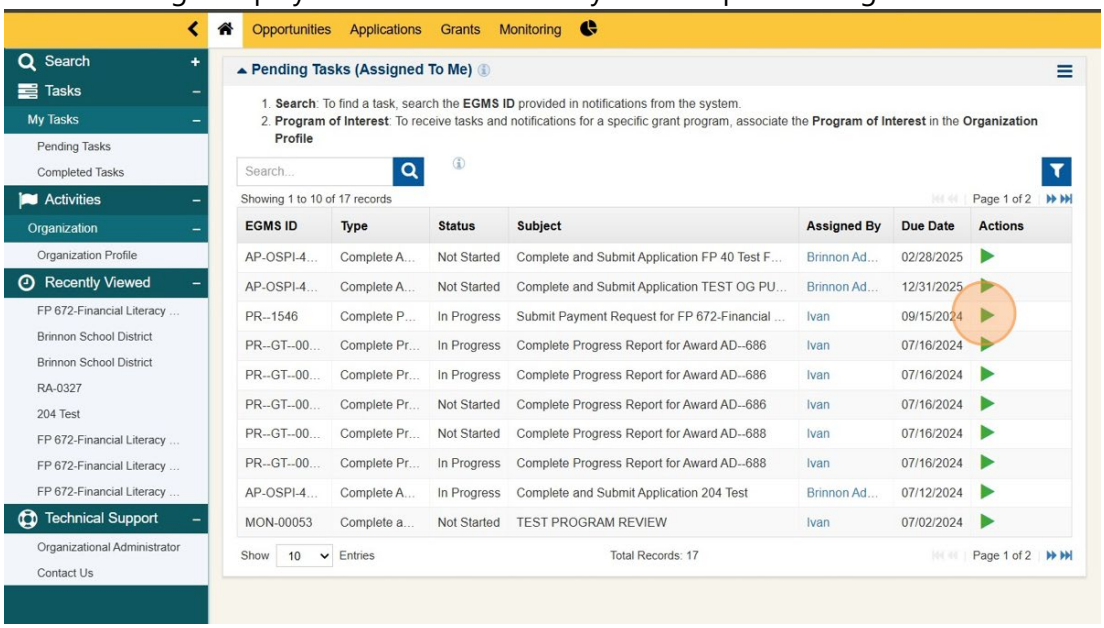
Responding to an OSPI-initiated Payment Request within the Education Grants Management System (EGMS)

This guide will demonstrate the different ways to access Payment Requests within EGMS.

1. Begin on the Home tab and click the hyperlink number next to Monitoring, within the Task Summary By Phase box.



2. Click the green play button next to the Payment Request to begin.



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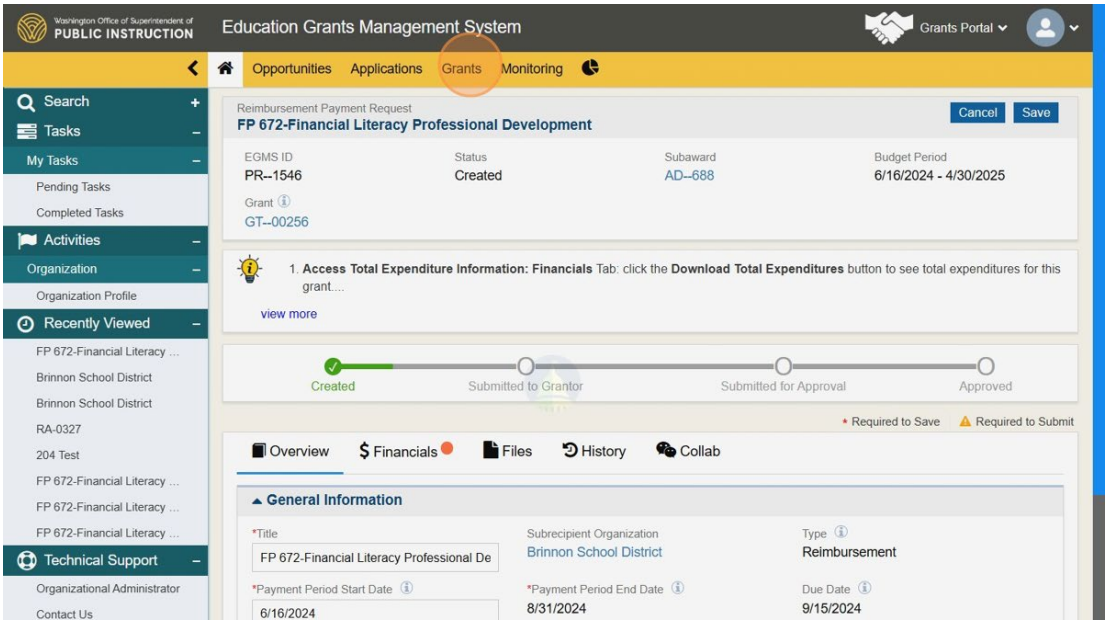
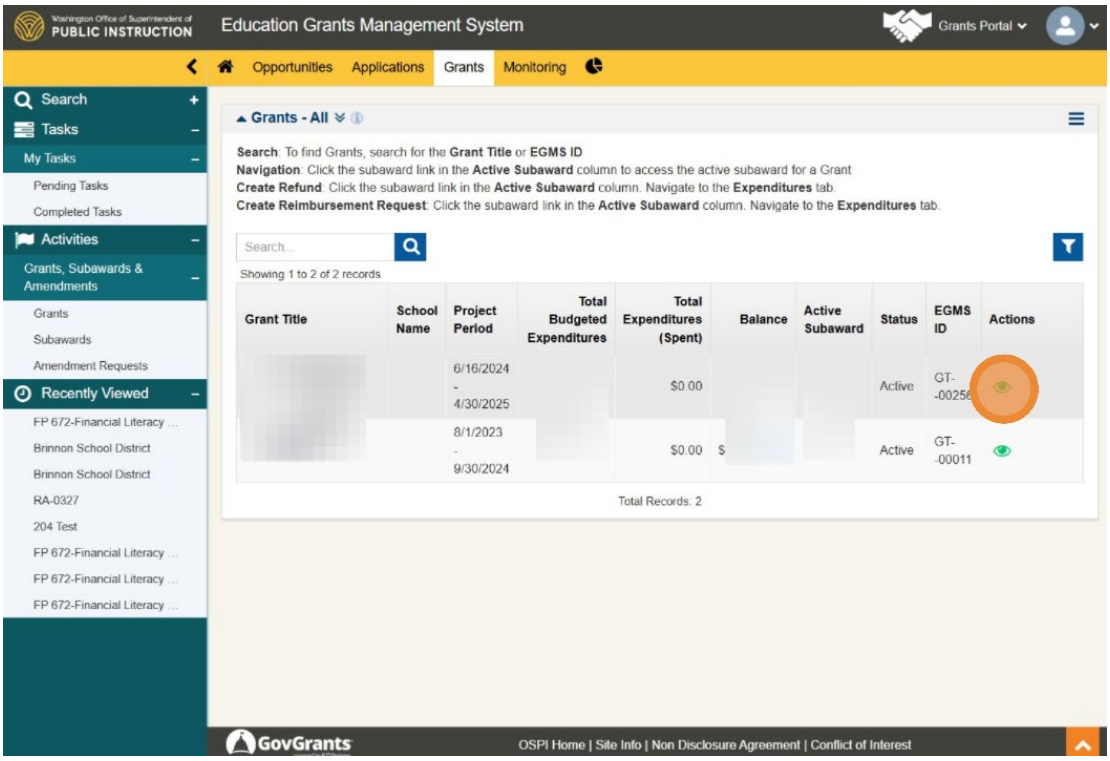
Here is the second way to access Payment Requests.

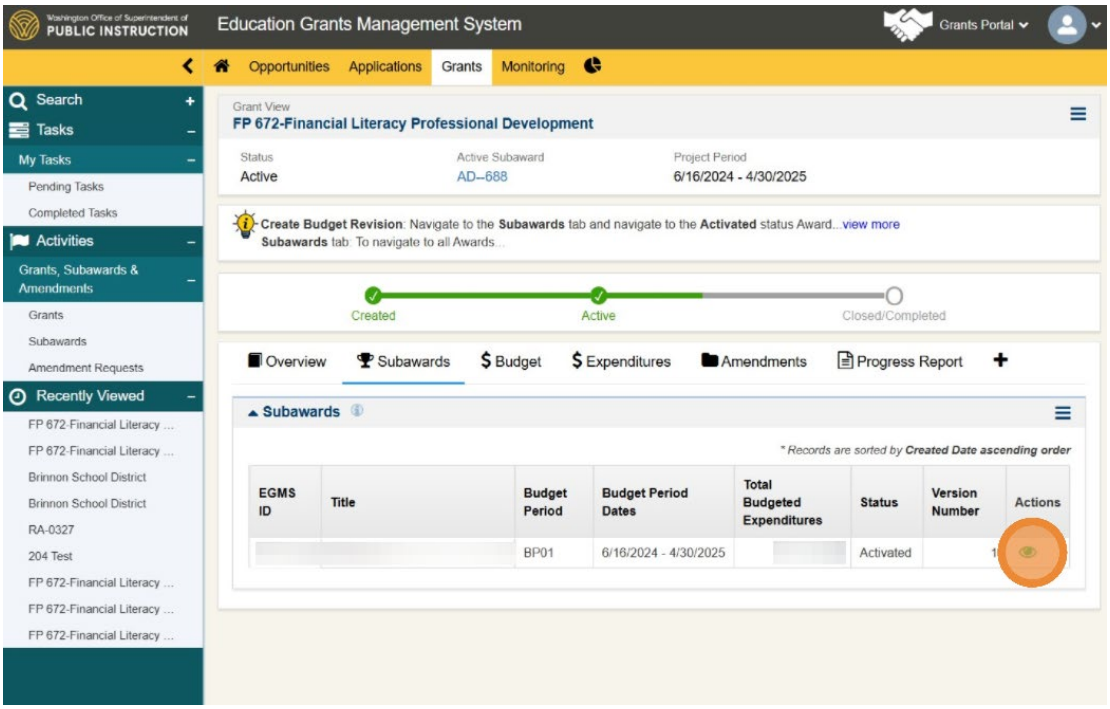
3. Click the Grants tab from the gold toolbar.



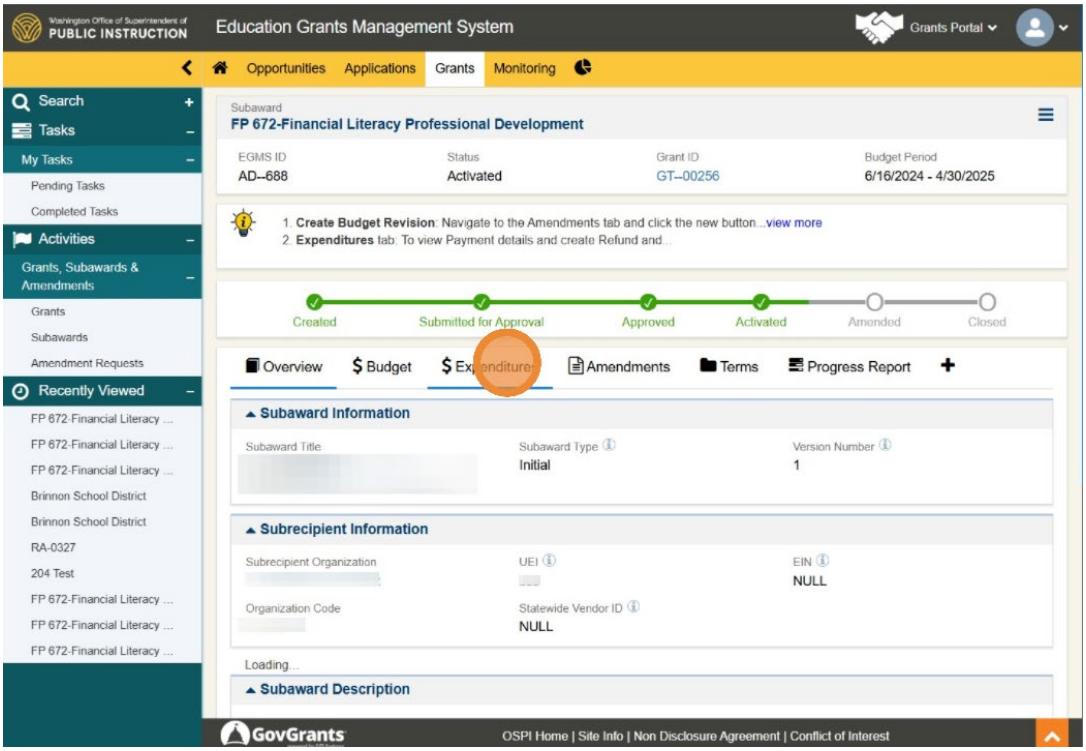
4. Click the green eye icon next to the grant with the Payment Request.



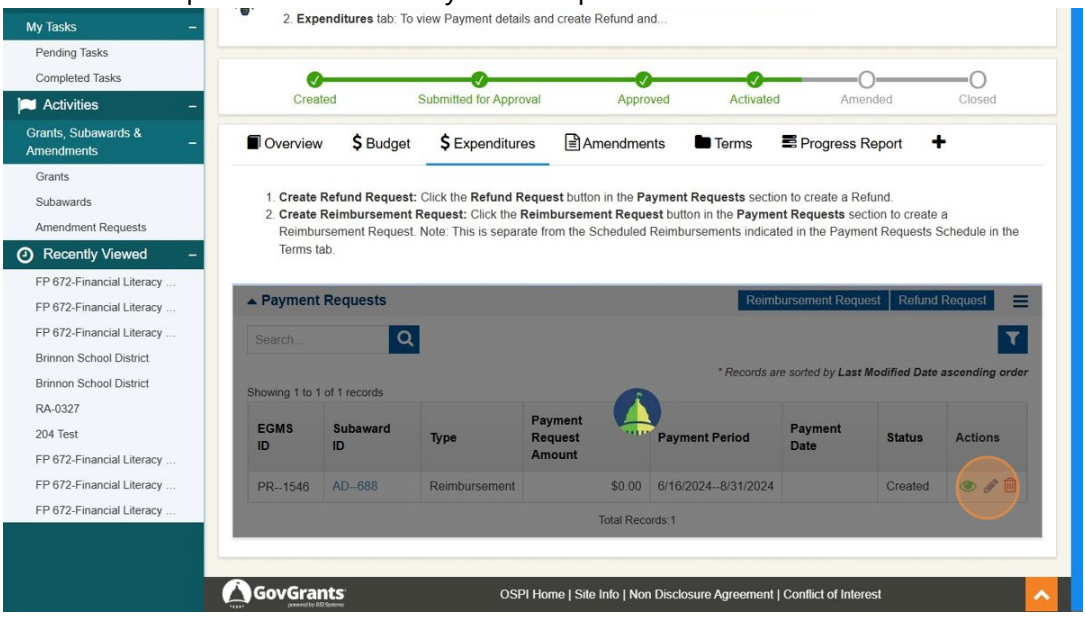
5. Within the Subawards tab, click the green eye icon to open the record.



6. Click the “Expenditures” tab.

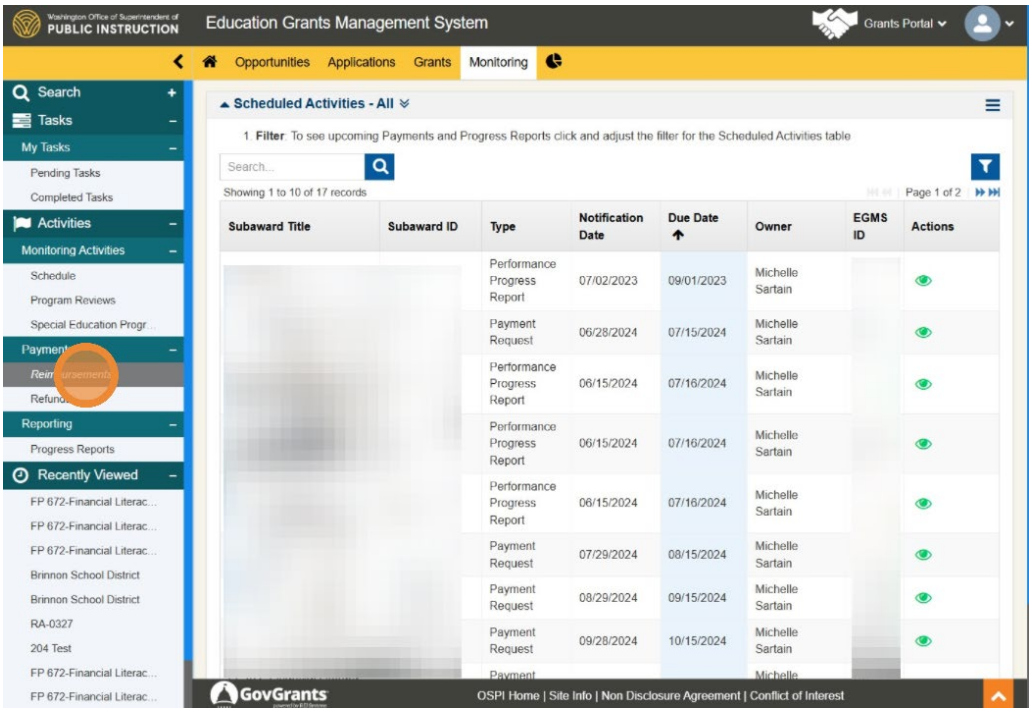


7. Click the blue pencil to edit the Payment Request in “created” status.

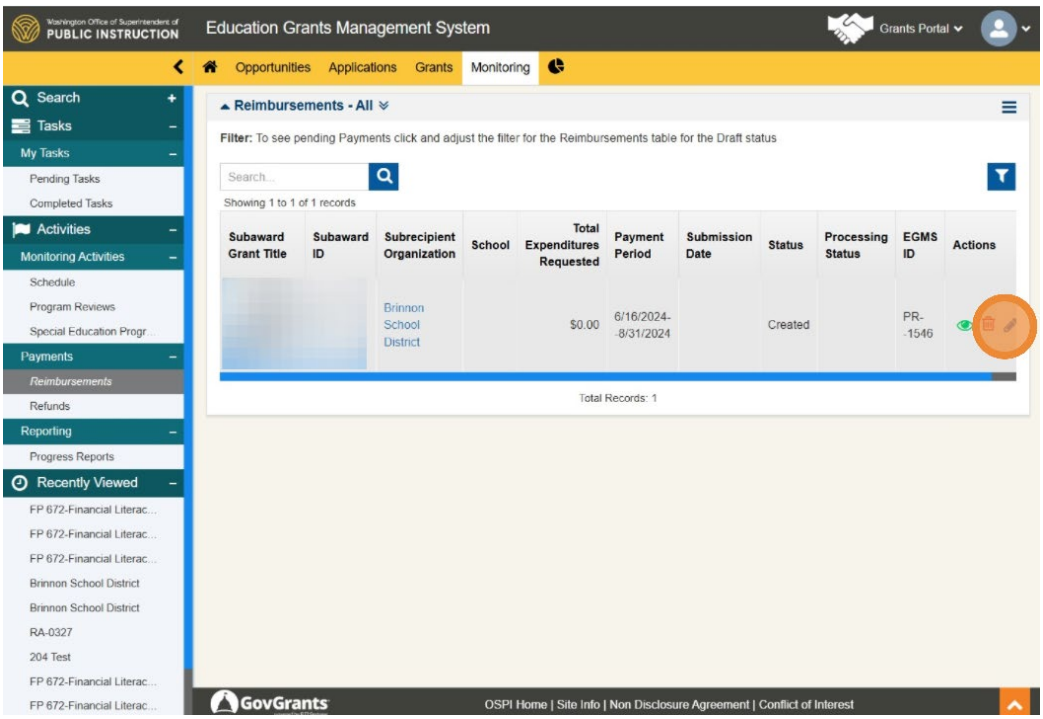


Here is the third way to access Payment Requests.

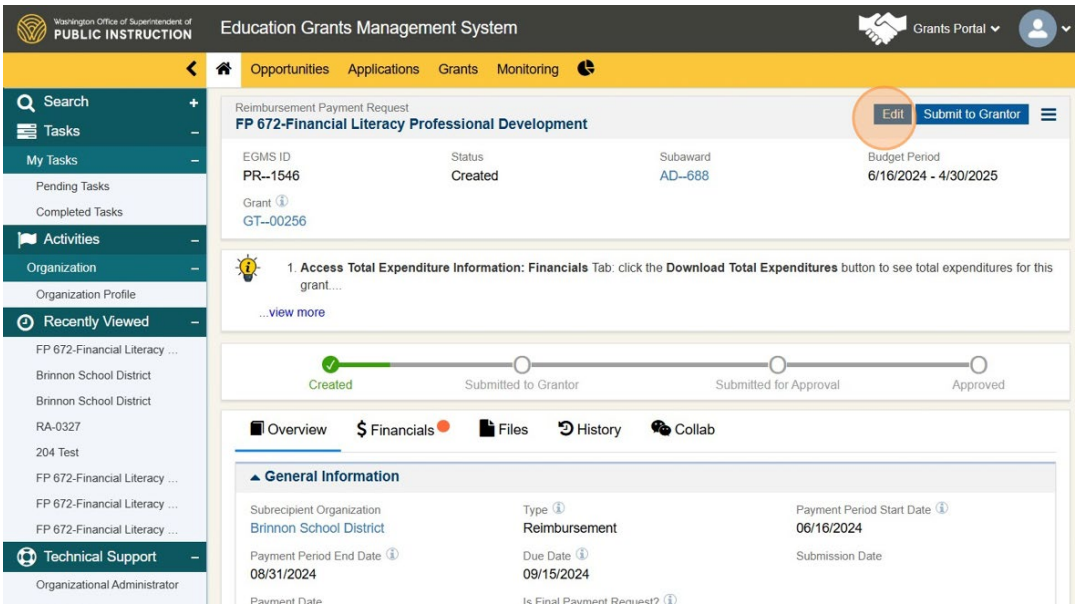
8. Click the Monitoring tab on the gold toolbar and then click “Reimbursements” from the left navigation panel.



9. Click the blue pencil next to the correct record within the Reimbusements table.

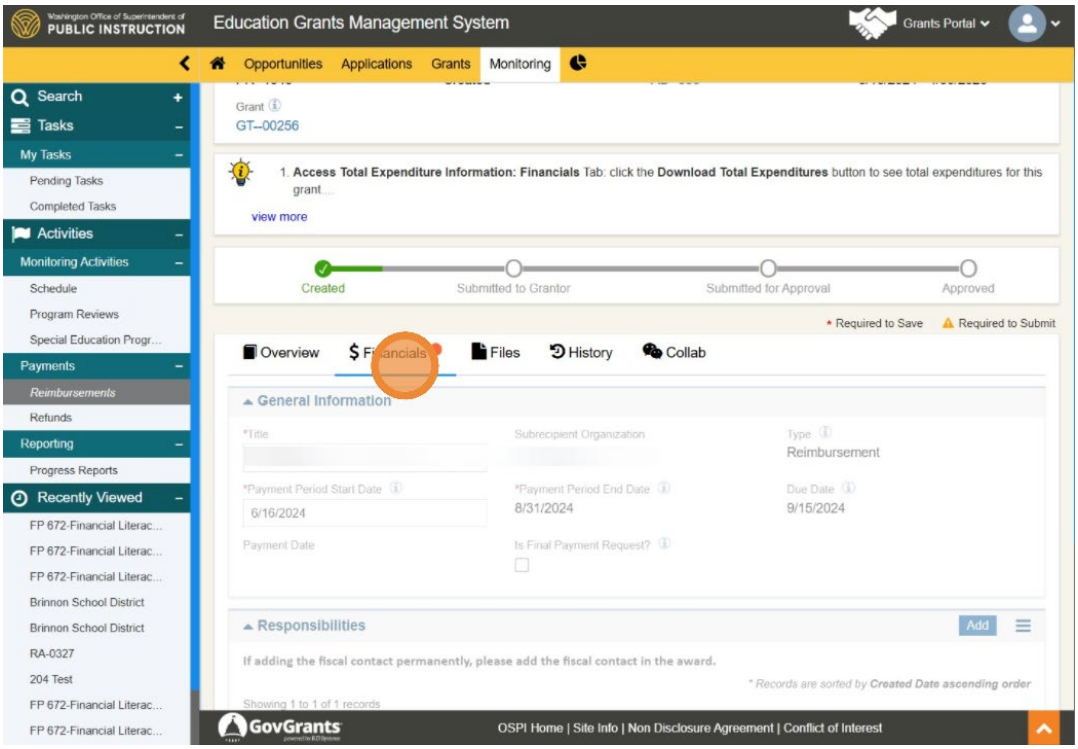


10. Click "Edit" in the top right corner.

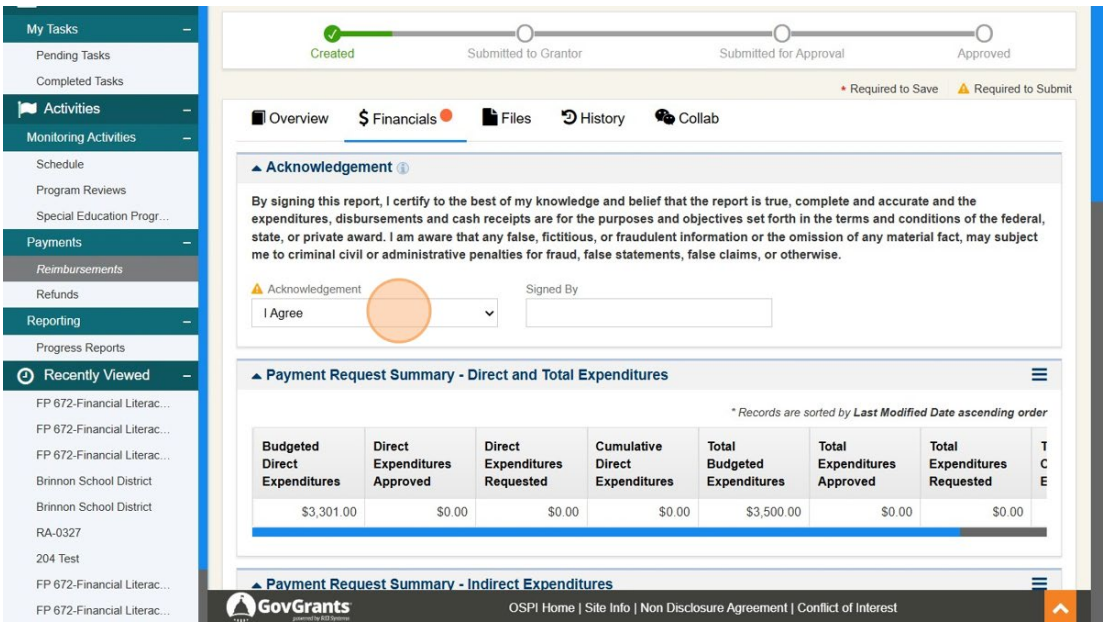


Follow these steps to complete the Payment Request.

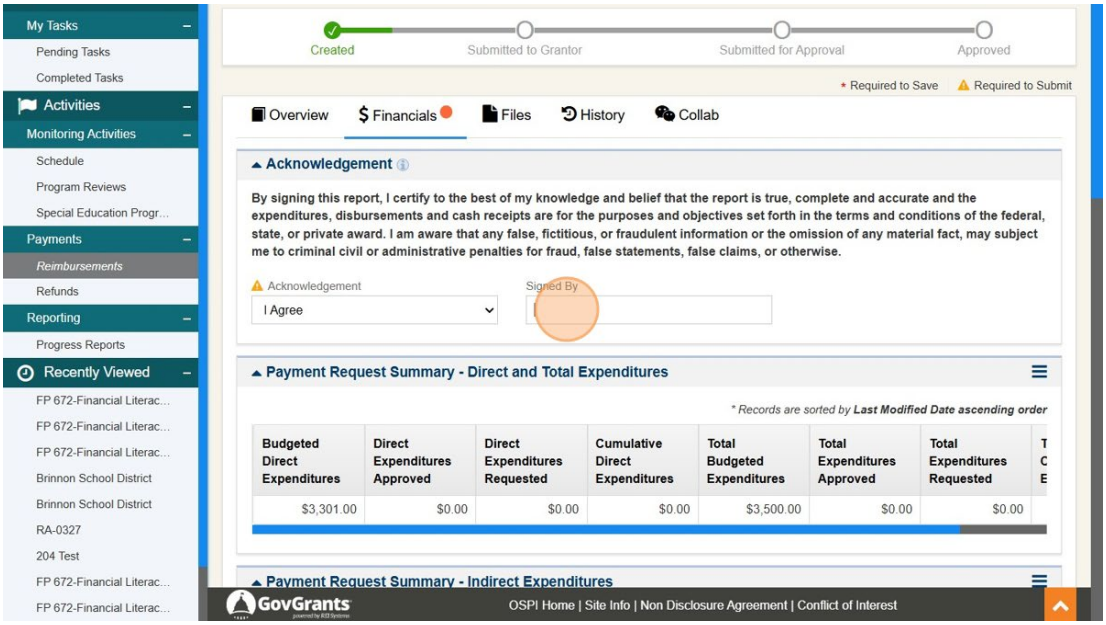
11. Click the "Financials" tab. We can see by the orange dot next to the tab that there are required fields that have not been completed.



12. Respond to the Acknowledgment section.

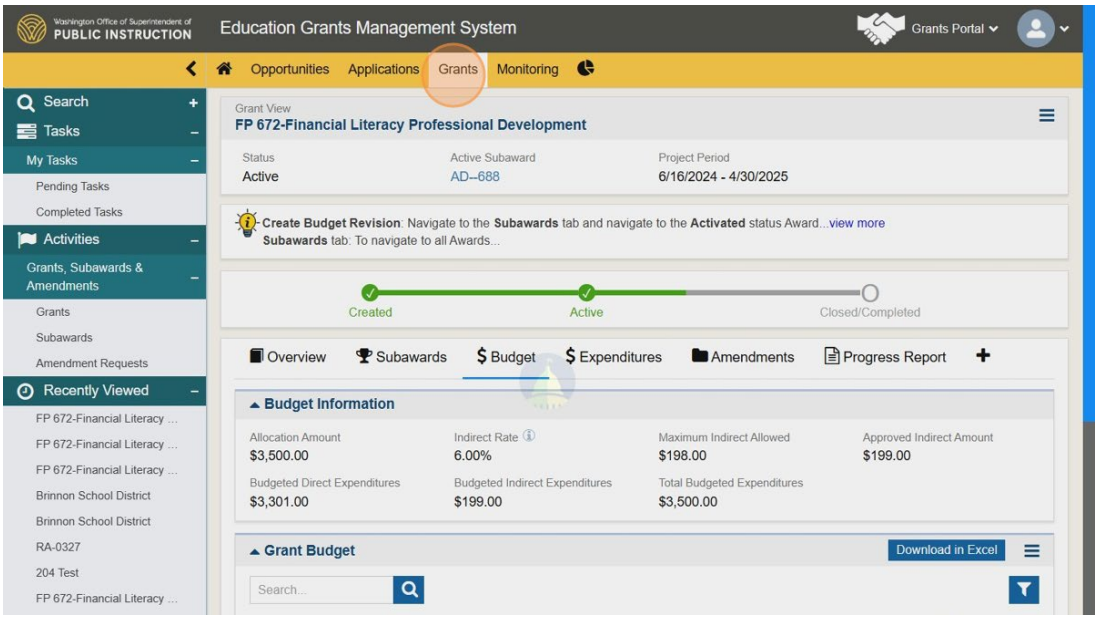


13. Enter your information into the “Signed By” field.

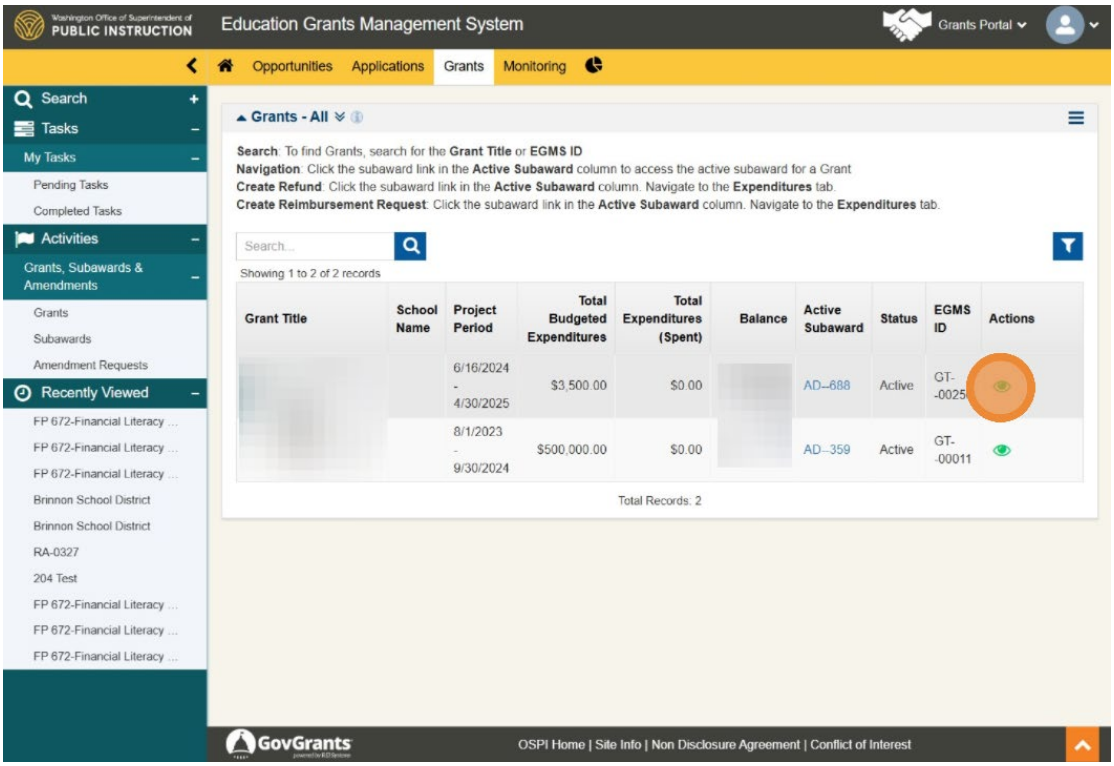


Tip! To view the grant's budget, click the Grants tab. If you right click the Grants tab, it will open up in a new window and you won't lose your place in the Payment Request.

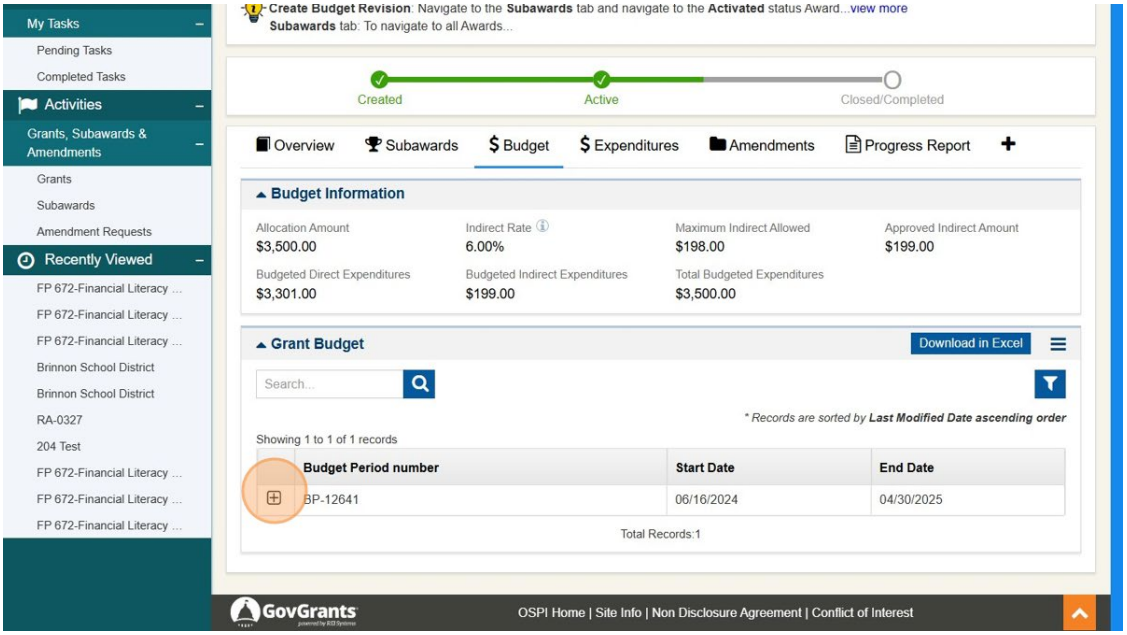
14. Right click the "Grants" tab.



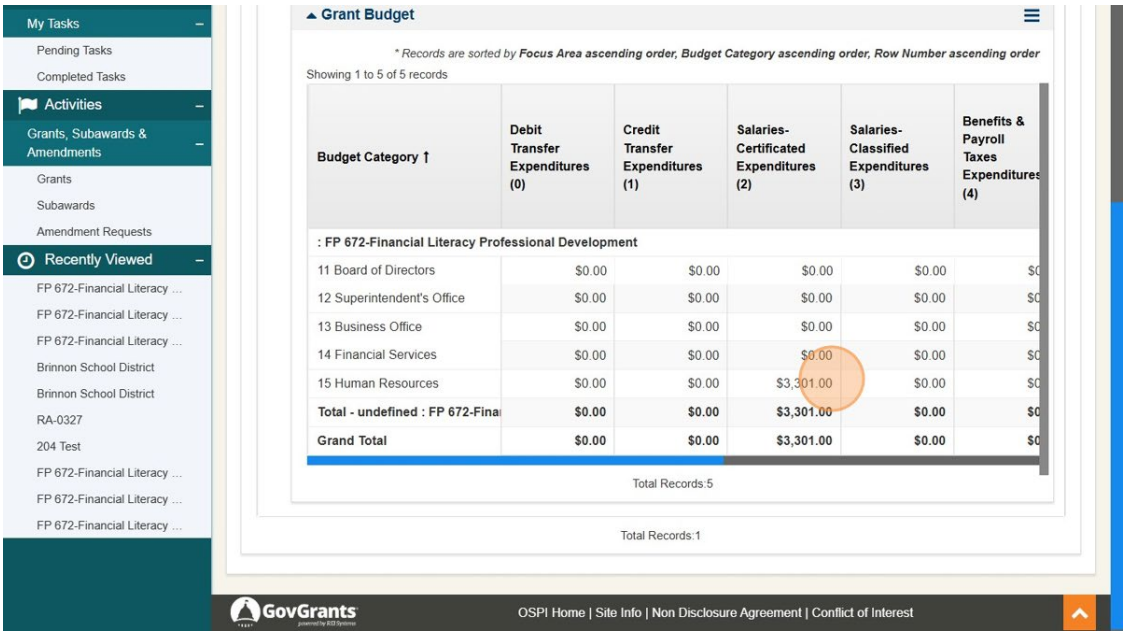
15. Click the green eye next to the record to open it.



16. Under the Grant Budget table, click the plus button to expand the record.

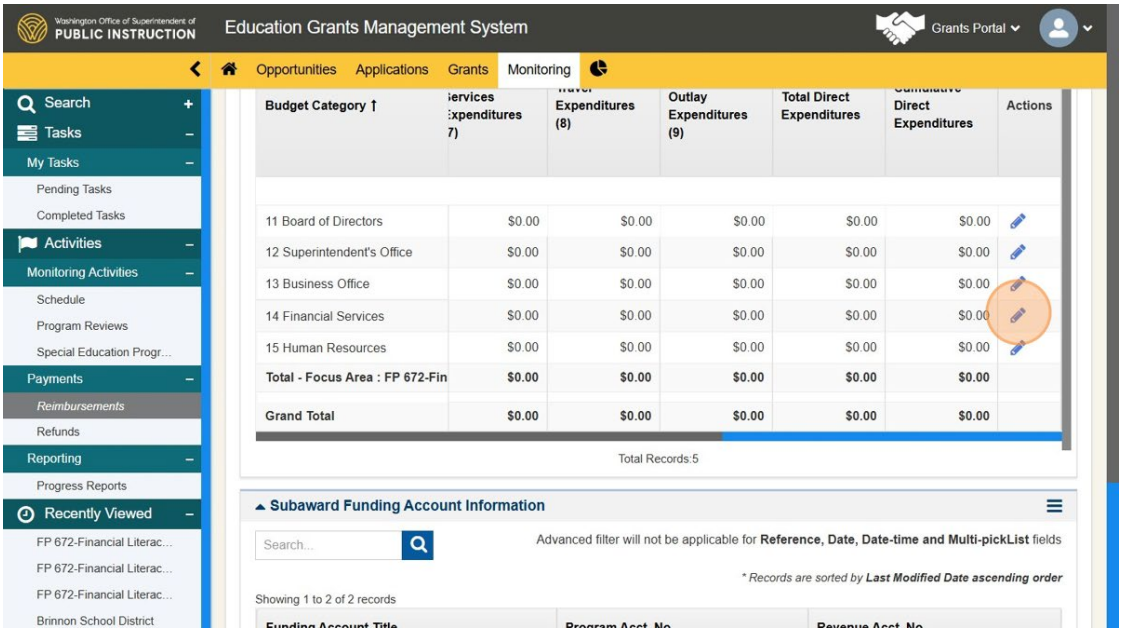


17. Locate which line items you have budgeted your funds under. This will help you claim in the correct categories or identify the need to create a budget amendment in the future.

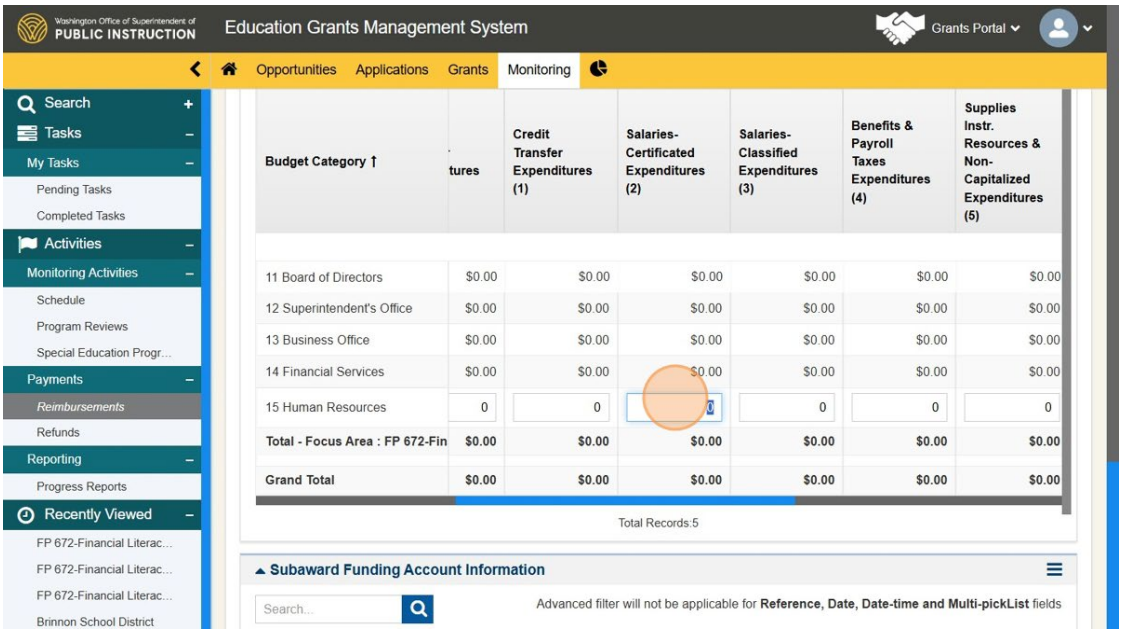


Return to your original tab with the Payment Request.

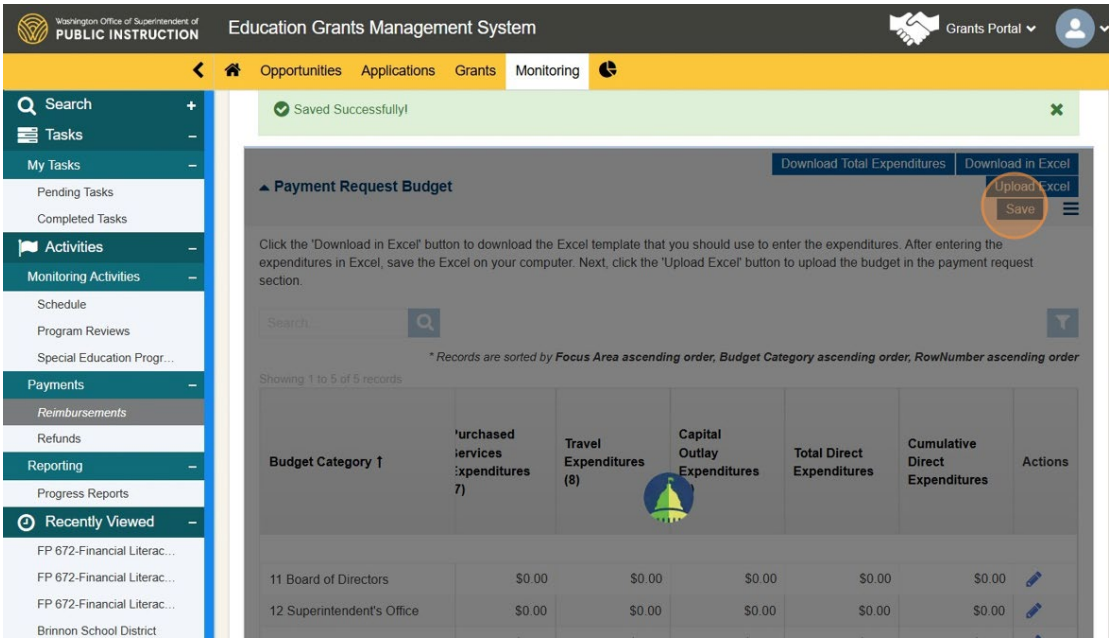
18. Within the Financials tab, scroll to the Payment Request Budget table. Click the blue pencil on the line you'd like to edit.



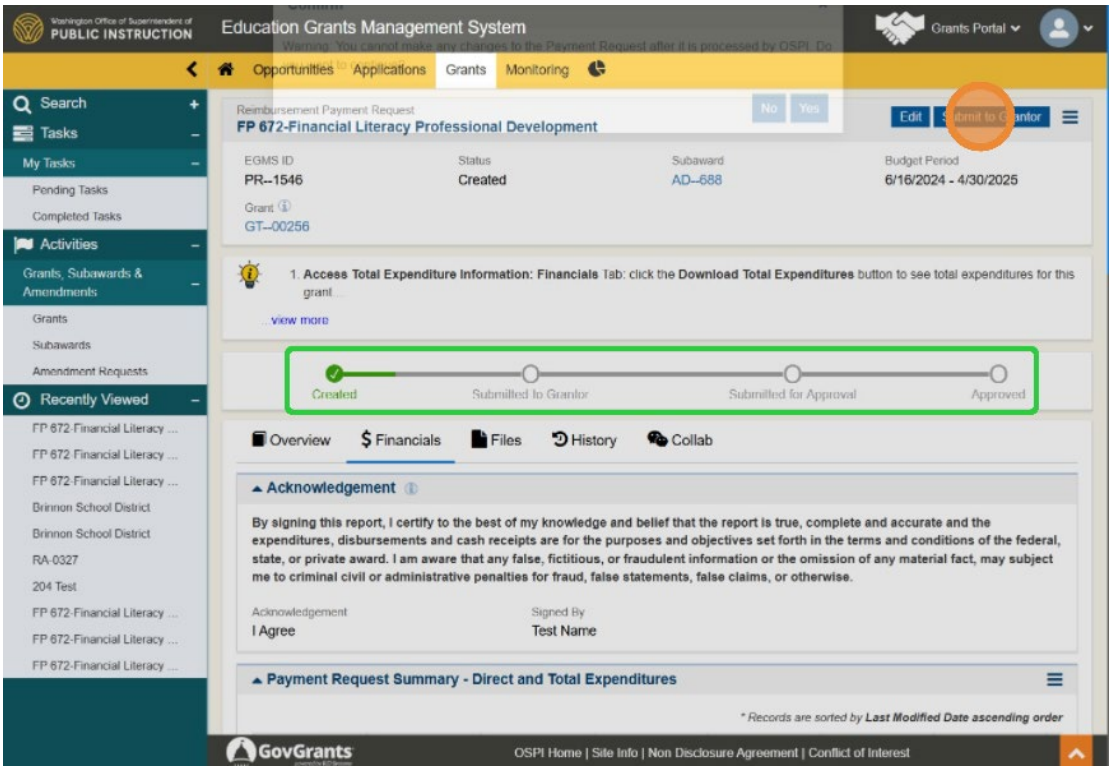
19. Add funds to the appropriate line items.



20. Click "Save" **<u>within the budget table</u>**!



21. Click "Submit to Grantor" on the top of the page.



22. Respond to the confirmation message. The status bar (within the green rectangle in the image above) will update to “Submitted to Grantor.”