How to Create an Ad-Hoc Claim and Refund Request within the Education Grants Management System (EGMS)

1. Begin on the home tab once you have logged in. Click "Grants" on the gold tool bar.

Westington Office of Superintendent of PUBLIC INSTRUCTION	Education Grants Management Sy	stem			***
<	Opportunities Applications Grants	Monitoring			
Q Search - Search Q All	Create Application: Click the Opportunities View Current/Past Applications: Click the A View Current/Past Amendments: Click the View Current/Past Amendments: Click the Mon View Current/Past Payments: Click the Mon View Current/Past Progress Reports: Click EGMS ID: To access a specific record in the s	module in the top menu pplications module in th module in the top menu Grants module in the top itoring module in the top the Monitoring module i ystem, Search the EGM	ie top menu menu menu n the top menu S ID in the left menu		
asks -	Task Summary By Phase		Task Summary By Due Date		My Feed
My lasks -	Opportunities	0	Late	22	No feeds available.
Completed Tasks	Applications	7	Due within 7 Days	0	
📁 Activities 🛛 –	Grants	1	Due within 30 Days	0	
Organization –					
Organization Profile	Monitoring	15	Due in more than 30 Days	1	
Recently Viewed -					
FP 672-Financial Literacy					
Consolidated Grant Applic					
ESEA Consolidated Grant					
Homeless Ed Test Announ					
Homeless Ed Test Announ					
21et CCLC - Vest 1 - Test					
21st CCLC - Year 1 - Test					
Consolidated Grant Applic					
A Tachnical Support					
Organizational Administrator					

2. Click the green eye icon to open the record.

Westington Office of Supermander, of PUBLIC INSTRUCTION	Education Grants Managem	ent System							-	Grants	Portal 🗸 😕 🗸
<	Opportunities Applications	Grants Monitoring									
Q Search –	Oracle All M.O.										-
Search O	▲ Grants - All ♥ (1)	Click 'Reset Table'	under the men	i icon to refresh the	table's default values						=
Countria.	Search: To find Grants, search for the Navigation: Click the subaward link	he Grant Title or EGMS ID in the Active Subaward column to ac	cess the activ	e subaward for a	Grant						
All	Create Refund: Click the subaward Create Reimbursement Request	link in the Active Subaward column. Click the subaward link in the Active S	Navigate to the ubaward color	e Expenditures ta mn. Navigate to t	ib. ie Expenditures tab.						
📑 Tasks 🛛 –	Search	0									T
My Tasks _	Showing 1 to 4 of 4 records										
Pending Tasks						Total					
Completed Tasks	Grant Title		Name	Project Period	Total Budgeted Expenditures	Expenditures (Spent)	Balance	Active Subaward	Status ↑	EGMS	Actions
Grants, Subawards &				6/16/2024 - 4/30/2025	\$80,000.00	\$0.00	\$80,000.00	AD691	Active	GT- -00259	۲
Grants				7/1/2024 - 6/30/2025	\$10,000.00	\$0.00	\$10,000.00	AD693	Active	GT- -00261	
Amendment Requests				12/26/2023	\$99,000.00	\$0.00	\$99,000.00	AD735	Active	GT- -00301	۲
Recently Viewed -				7/1/2021 - 8/31/2022	\$9,658,442.00	\$0.00	\$9,658,442	AD348	Active	GT-	۲
Consolidated Grant Applic				Tota	Records: 4						
ESEA Consolidated Grant											
Homeless Ed Test Announ											
Homeless Ed Test Announ											
Homeless Ed Test Announ											
21st CCLC - Year 1 - Test											
21st CCLC - Year 1 - Test											
Consolidated Grant Applic											
	AGovGrants		05	PI Home Site Infr	I Non Disclosure Agree	ment Conflict of	nterest				
	Factor Provide and			one une	, man a stationare rigide	and a connect of			_	_	



Washington Office of Superintendent of **PUBLIC INSTRUCTION**

3. Click the "Subawards" tab.

	Education Grar	nts Manageme	ent System							-	Gra
<	A Opportunities	Applications	Grants Moni	toring 🕓							
Q Search –	Active		_	AD691		6/16/2024 - 4/3	0/2025				
Search Q	- Create Budg Subawards	et Revision: Navig ab: To navigate to	gate to the Subav all Awards	wards tab and navigat	e to the Activated status A	wardview more					
All 🗸									-		
📲 Tasks 🛛 🗕		Create	d		Active			C	Closed/Complete	ł	
My Tasks _			é nute					and Files	Dutation	A c	
Pending Tasks	Overview	Y Subaward	as 🎝 Buage	et > Expenditui	es Amendment	s 🔳 Progress Rep		orms and Files	History	TO CO	llab
Completed Tasks	Expenditu	re Summary									_
Activities –											
Grants, Subawards & Amendments	\$80,000.00	xpenditures			Iotal Direct Expenditures			\$0.00	Expenditures		
Grants	Balance ①										
Subawards	\$80,000.00										
Amendment Requests	A Payment F	Requests 🚯									
Recently Viewed -	Search		0								
FP 672-Financial Literacy	Showing 1 to 1	of 1 records	~								
FP 672-Financial Literacy	EGMS ID	Subaward ID	Type	P	wment Dequeet Amount	Payment Period	Paid Date	Payment De	ference	Statue	
Consolidated Grant Applic	Lomo io	Jubawara ib	type		initiation and a second second	r uyment r erioù	T and Date	i uyment ite	Terence	510103	~
ESEA Consolidated Grant	PR1547	AD691	Reimburser	nent	\$0.00	6/16/20248/31/2024				Created	<
Homeless Ed Test Announ					1	otal Records: 1					
Homeless Ed Test Announ											_
Homeless Ed Test Announ	 Expenditu 	re Details								Download Ex	xpen
21st CCLC - Year 1 - Test									E 10 1		

4. Click the green eye icon to open the subaward. Reminder: always work within the activated subaward!

Washington Office of Superintenders of PUBLIC INSTRUCTION	Education Grants	s Management	System						Grants	s Portal 🗸 🙆 🗸
<	Opportunities	Applications Gr	ants Monitoring	6						
Q Search -	Grant View									_
										-
Search	Status		Ac	tive Subaward		Project Period				
All 🗸	Active		A	D691		6/16/2024 - 4/30/20	025			
Turka	-	t Revision: Navigate	to the Subawards	s tab and navigate to th	he Activated status Awa	rdview more				
- Iasks -	Subawards tab	b: To navigate to all A	wards							
My Idsks –										
Completed Tasks		Created			Active			Closed/Complete	od.	
Activities -		Cicated			710070			onoou complete		
Grants, Subawards & Amendments	Overview		\$ Budget	\$ Expenditures	Amendments	Progress Report	Forms and Files	3 History	Collab 🍋	
Grants	A Subawards	٢								=
Subawards								* Records are	sorted by Created Date	ascending order
Amendment Requests		-							onico oy orealed ball	ascending order
Recently Viewed –	EGMS ID	Title		Budget Period	Budget Period D	ates Total E	Judgeted Expenditures	Status	Version Number	Actions
HP 072-Financial Literacy	AD691			BP01	6/16/2024 - 4/30/2	025	\$80,000.00	Activated		1
FP 672-Financial Literacy										
Consolidated Grant Applic										
ESEA Consolidated Grant										
Homeless Ed Test Announ										
Homeless Ed Test Announ										
Homeless Ed Test Announ										
21st CCLC - Year 1 - Test										
21st CCLC - Year 1 - Test										
Consolidated Grant Applic										
	GovGrants	i i			OSPI Home Site Inf	> Non Disclosure Agreeme	nt Conflict of Interest			^

5. Click "Reimbursement Request."

AD691		A	ctivated	GT0	0259	6/16/2	2024 - 4/30/2025	
1. Create I 2. Expend	Budget Revisio litures tab: To vi	on: Navigate to the Ame iew Payment details an	endments tab and click th d create Refund and	ne new buttonview more				
Cre	ated	Subr	mitted for Approval	Approved	Activated	O	led	Closed
Overview 1. Create Ref 2. Create Rei Reimburser	\$ Budget	\$ Expenditures Click the Refund Reque equest: Click the Reim in the Payment Reque	Amendments est button in the Payme abursement Request but sts Schedule in the Term	Terms Progress R and Requests section to create a Ref atton in the Payment Requests sect is tab.	eport Forms and F und. ion to create a Reimburseme	iles D History	Collab	cheduled
Overview . Create Ref Create Ref Reimburser Payment Re Search	\$ Budget und Request: (mbursement R ments indicated equests	\$ Expenditures	Amendments est button in the Payme bursement Request b sts Schedule in the Term	Terms Progress R	eport Forms and F und. ion to create a Reimburseme	iles D History nt Request. Note: This is s Reimburs	Collab eparate from the So ement Request F	cheduled Refund Reque
Overview Create Ref Create Ref Reimburser Payment Re Search Showing 1 to 1 of 1	\$ Budget und Request: (mbursement R ments indicated equests	\$ Expenditures Click the Refund Reque equest: Click the Refir in the Payment Reque:	Amendments est button in the Payme hbursement Request bi sts Schedule in the Term	► Terms ■ Progress R Int Requests section to create a Ref to in the Payment Requests sect is tab.	eport Forms and F und. Ion to create a Reimburseme	illes D History It Request. Note: This is a Reimburg * Records are so	Collab eparate from the Se ement Request f f orted by Last Modifie	cheduled Refund Reque
Overview Create Ref Create Ref Reimburser Payment Re Search Showing 1 to 1 of 1 EGMS ID	\$ Budget und Request: 0 mbursement R ments indicated equests	\$ Expenditures	Amendments est button in the Payme button in the Request b sts Schedule in the Terr	► Terms ■ Progress R At Requests section to create a Ref. to in the Payment Requests sect is tab. Payment Request Amount	eport Forms and F und. Ion to create a Reimburseme Peyment Period	nt Request. Note: This is a Reimburg * Records are ac	Collab eparate from the Si ement Request F exercised by Last Modifie Status	cheduled Refund Reque ed Date ascend Actions
Overview Create Ref Create Ref Create Ref Reimburser Payment Re Search Showing 1 to 1 of 1 EGMS ID PR-1547	\$ Budget und Request: 0 mbursement R ments indicated equests t records Subawarc AD691	\$ Expenditures Click the Refund Reque Q HD Type Reimbo	Amendments Amend	► Terms ■ Progress R At Requests section to create a Ref. to in the Payment Requests section be b	Peyment Period 6/16/2024-@/31/2024	iles D History At Request. Note: This is a Reimburg * Records are ac Payment Date	Collab expanded from the Science erment Request for the Science f	cheduled Refund Reque ed Date ascen Actions

6. Enter information into the required fields.

General Informatio	n
*Title	*Payment Period Start Date (1)
	6/16/2024
	Туре
	Reimbursement

7. Click "save and continue."

i ayment i enot			
4/30/2025			
Subaward Id			
AD691			
)
		Ame	nded
	Save and Continue		
		History	Section 2011 Collab

Tip! If there is a reimbursement payment request currently in progress, you cannot submit. Typically you would do ad hoc claims and refunds after the budget period, so it wouldn't be an issue.

8. Click "Refund Request."

	Created	Sub	mitted for Approval	Approved	Activated	Amen	ded	Closed
Overvier	v \$ Budget	\$ Expenditures	Amendments	Terms SProgress Re	eport 📑 Forms and F	ïles 🤊 History	🏟 Collab	
Showing 1 to	1 of 1 records					Aecords are a	when by East mounte	o Date discerta
enering i te		ID Type		Payment Request Amount	Payment Period	Payment Date	Status	Actions
EGMS ID	Subaware	in ite						
EGMS ID PR1547	Subaware AD691	Reimb	ursement	\$0.00	6/16/20248/31/2024		Created	۵ ۴ ۱

9. Enter your information.

	Subaw		
λ	FP 67	11.6	
	AD-	eneral information	
~	Titl	e	Payment Period Start D
	-0		6/16/2024
			Туре
-			Refund
-			

10. Click "save and continue."

Payment Period End Date 💿	
4/30/2025	
Subaward	
AD691	
	0
	Closed
Save and Continue	
	Collab
e a Refund.	

sts section to create a Reimbursement Request. Note: This is separate from the Scheduled