

CAL-E-GRANTS REFERENCE GUIDE: SOCIAL ENTREPRENEURS FOR ECONOMIC DEVELOPMENT (SEED): SUBMITTING AN INVOICE IN CAL-E-GRANTS

You must first log in to the system in order to apply for funding. Please refer to the **New User Registration** reference material for step-by-step procedures on how to become a user of the Cal-E-Grants system

<div>1. From the Cal-E-Grants landing page, select the large Grants button</div>	<div></div>																
<div>2. Click on the Grant ID for Social Entrepreneurs for Economic Development 21/22 link from the Grants list</div>	<div><div><div><div>Grants</div><div>All ▾</div><div></div></div><div>3 items • Sorted by Grant ID • Filtered by All grants • Updated 16 minutes ago</div><div><table><tr><th></th><th>Grant ID ↑ ▾</th><th>Grant Number ▾</th><th>Funding Opportunity ▾</th></tr><tr><td>1</td><td>G-0015</td><td>1</td><td>Paid Family Leave 2 Small Business Grant (PFL SB Grant) 2021</td></tr><tr><td>2</td><td><div><div>G-0020</div></div></td><td>G-007</td><td>Social Entrepreneurs for Economic Development 21/22</td></tr><tr><td>3</td><td>G-0022</td><td>S-9898</td><td>High Road Training Partnerships: Resilient Workforce General Fund (RWF) Program</td></tr></table></div></div></div>		Grant ID ↑ ▾	Grant Number ▾	Funding Opportunity ▾	1	G-0015	1	Paid Family Leave 2 Small Business Grant (PFL SB Grant) 2021	2	<div><div>G-0020</div></div>	G-007	Social Entrepreneurs for Economic Development 21/22	3	G-0022	S-9898	High Road Training Partnerships: Resilient Workforce General Fund (RWF) Program
	Grant ID ↑ ▾	Grant Number ▾	Funding Opportunity ▾														
1	G-0015	1	Paid Family Leave 2 Small Business Grant (PFL SB Grant) 2021														
2	<div><div>G-0020</div></div>	G-007	Social Entrepreneurs for Economic Development 21/22														
3	G-0022	S-9898	High Road Training Partnerships: Resilient Workforce General Fund (RWF) Program														
<div>3. Note the different tabs you can navigate between.</div>	<div><div><div><div>Grant</div><div>UAT Testing - Entrepreneurship Program - Amina Nasufovic</div></div><div><div>New Modification Request</div><div>New Invoice</div></div><div><table><tr><td>Project Period 6/1/2021 - 6/1/2022</td><td>Total Grant Amount \$200,000.00</td><td>Total Encumbered Amount \$1,000,000.00</td></tr></table></div><div><div><div>✓</div><div>Active</div><div>Closed</div></div></div><div><div>Details</div><div>Budget Allocation</div><div>Modification Requests</div><div>Invoices</div><div>Documents</div></div></div></div>	Project Period 6/1/2021 - 6/1/2022	Total Grant Amount \$200,000.00	Total Encumbered Amount \$1,000,000.00													
Project Period 6/1/2021 - 6/1/2022	Total Grant Amount \$200,000.00	Total Encumbered Amount \$1,000,000.00															

CAL-E-GRANTS REFERENCE GUIDE: SOCIAL ENTREPRENEURS FOR ECONOMIC DEVELOPMENT (SEED): SUBMITTING AN INVOICE IN CAL-E-GRANTS

4. Select the **New Invoice** button at the top right of the page

Grant
UAT Testing - Entrepreneurship Program - Amina Nasufovic

New Modification Request **New Invoice**

Project Period	Total Grant Amount	Total Encumbered Amount	Total Invoiced Amount
6/1/2021 - 6/1/2022	\$200,000.00	\$1,000,000.00	

Active Closed

5. Select **First Disbursement** from the Disbursement Type drop down list. Once selected, click **Next**

Select Disbursement

* Disbursement Type

First Disbursement

First Disbursement
Second Disbursement
Third Disbursement
Fourth-Final Disbursement

Select Disbursement

* Disbursement Type

First Disbursement

Cancel **Next**

CAL-E-GRANTS REFERENCE GUIDE: SOCIAL ENTREPRENEURS FOR ECONOMIC DEVELOPMENT (SEED): SUBMITTING AN INVOICE IN CAL-E-GRANTS

6. Fill out the New GMS Invoice fields. Click Save when you are done. Required fields are noted with a red asterisk (*)

**Note: Circles with an “i” in them are help bubbles. Hovering over them will cause help text to appear to assist in any definitions of fields*

New GMS Invoice: Entrepreneurship Program

Information

Invoice Name

Disbursement Type

Second Disbursement

Grant

G-0020

* Authorizing Signature Name ⓘ

test

* Invoice Amount

\$150,000.00

Eligibility Criteria

Eligibility Criteria

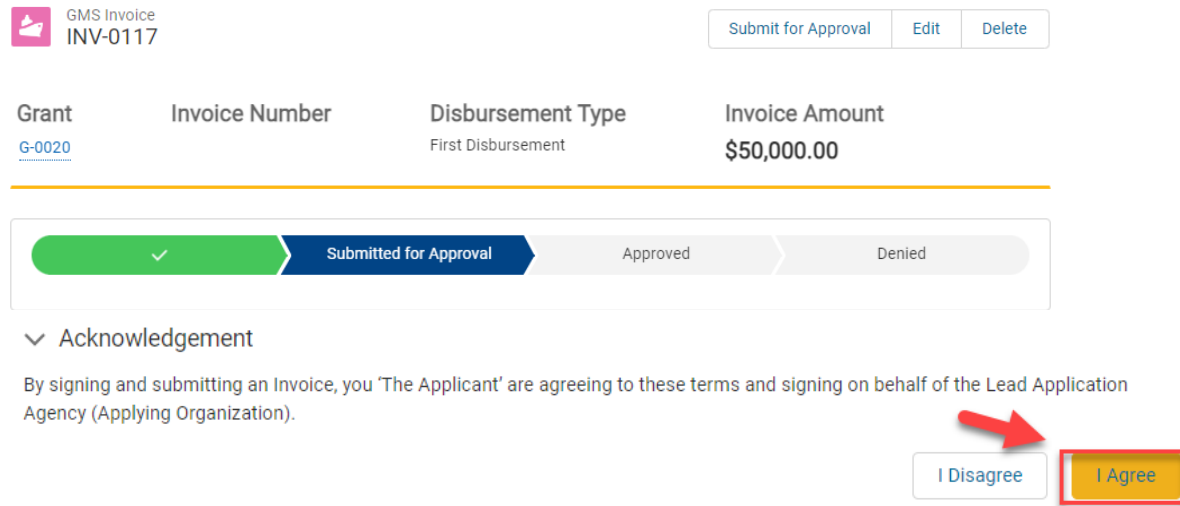
Cancel

Save & New

Save

CAL-E-GRANTS REFERENCE GUIDE: SOCIAL ENTREPRENEURS FOR ECONOMIC DEVELOPMENT (SEED): SUBMITTING AN INVOICE IN CAL-E-GRANTS

7. Once saved you will be taken to a new screen that will prompt you to the **Acknowledgment**. You must click **I Agree** to proceed.



GMS Invoice
INV-0117

Submit for Approval Edit Delete

Grant	Invoice Number	Disbursement Type	Invoice Amount
G-0020		First Disbursement	\$50,000.00

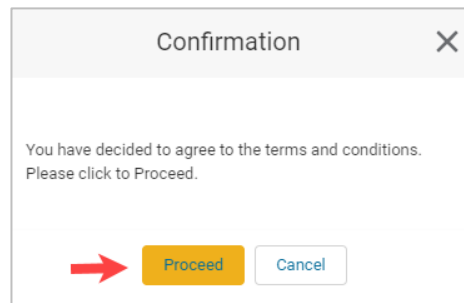
Submitted for Approval Approved Denied

✓ Acknowledgement

By signing and submitting an Invoice, you 'The Applicant' are agreeing to these terms and signing on behalf of the Lead Application Agency (Applying Organization).

I Disagree I Agree

8. A pop up will appear confirming your choice to agree with the acknowledgment. Click **Proceed** to continue



Confirmation

You have decided to agree to the terms and conditions.
Please click to Proceed.

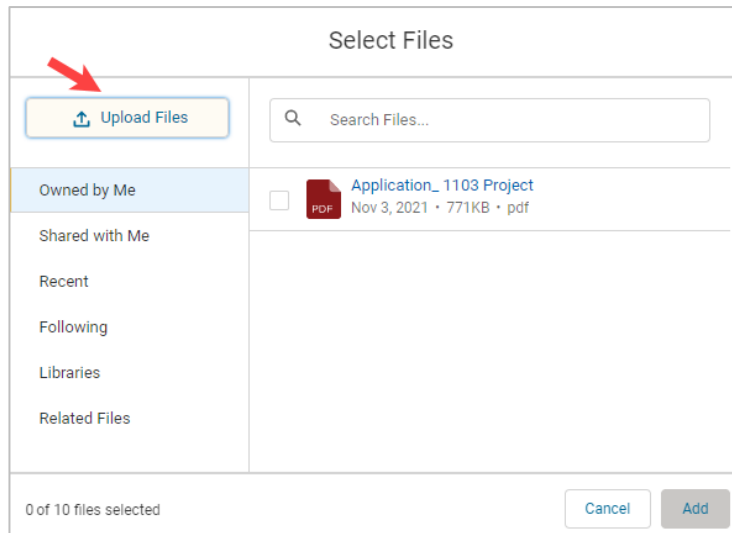
Proceed Cancel

CAL-E-GRANTS REFERENCE GUIDE: SOCIAL ENTREPRENEURS FOR ECONOMIC DEVELOPMENT (SEED): SUBMITTING AN INVOICE IN CAL-E-GRANTS

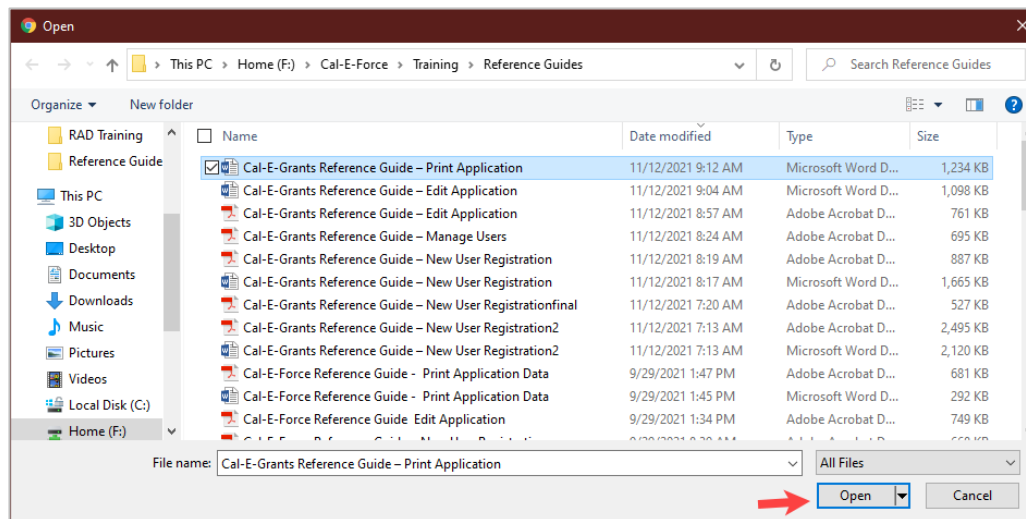
9. You will return to the details page. Review the information on the page. If any edits to information are needed, click the pencil icon to the right of the field	<div><div>DetailsDocuments</div><div><div><div>Information</div><div>Invoice Name INV-0117</div><div>Grant G-0020</div><div>Invoice Amount \$50,000.00</div></div><div><div>Disbursement Type First Disbursement</div><div>Authorizing Signature Name Test</div></div></div><div><div>Eligibility Criteria</div><div>Eligibility Criteria Upon Final Approval of Agreement</div></div><div><div>Description</div><div>Description First disbursement</div></div></div>								
10. To move to the next area of the invoice, click Documents from the Navigation Bar	<div><div><div>✓</div><div>Submitted for Approval</div><div>Approved</div><div>Denied</div></div><div><div>DetailsDocuments</div></div></div>								
11. Select the Upload files button to the right of the document name requested	<div><div>New</div><table><tr><th>Name</th><th>Status</th><th>Versions</th><th>Action</th></tr><tr><td>Micro-grant selection list</td><td>Active</td><td></td><td><div>Upload Files</div></td></tr></table></div>	Name	Status	Versions	Action	Micro-grant selection list	Active		<div>Upload Files</div>
Name	Status	Versions	Action						
Micro-grant selection list	Active		<div>Upload Files</div>						

CAL-E-GRANTS REFERENCE GUIDE: SOCIAL ENTREPRENEURS FOR ECONOMIC DEVELOPMENT (SEED): SUBMITTING AN INVOICE IN CAL-E-GRANTS

12. Select the **Upload Files** button to select the file from your computer



13. Select the file from the location on your computer and click **Open**



CAL-E-GRANTS REFERENCE GUIDE: SOCIAL ENTREPRENEURS FOR ECONOMIC DEVELOPMENT (SEED): SUBMITTING AN INVOICE IN CAL-E-GRANTS

<p>17. Enter in the Document Name and click Save</p>	<div><div>Create Document</div><div>Document Details</div><div><div>* Document Name</div><div></div></div><div><div>Document Format</div><div>--Select Value--</div></div><div><div>Other/Comments</div><div></div></div><div><div>Save</div><div>Cancel</div></div></div>												
<p>18. Once you click Save, a new field will have been added.</p> <p><i>*Note: Additional documents are not a requirement to attach</i></p>	<table><tr><th>Name</th><th>Status</th><th>Versions</th><th>Action</th></tr><tr><td>Micro-grant selection list</td><td>Active</td><td>1</td><td><div><div>Upload Files</div><div><div></div><div></div></div></div></td></tr><tr><td>test</td><td>Active</td><td></td><td><div><div>Upload Files</div></div></td></tr></table>	Name	Status	Versions	Action	Micro-grant selection list	Active	1	<div><div>Upload Files</div><div><div></div><div></div></div></div>	test	Active		<div><div>Upload Files</div></div>
Name	Status	Versions	Action										
Micro-grant selection list	Active	1	<div><div>Upload Files</div><div><div></div><div></div></div></div>										
test	Active		<div><div>Upload Files</div></div>										
<p>19. You are ready to submit. Verify all information has been completed. When ready to officially submit, click the Submit button at the top of the page</p> <p><i>*Note: Once you have formally submitted your invoice, you can no longer edit it</i></p>	<div><div><div><div><div></div></div><div>GMS Invoice</div><div>INV-0117</div></div><div><div>Submit for Approval</div><div>Edit</div><div>Delete</div></div></div><div><div>Grant</div><div>Invoice Number</div><div>Disbursement Type</div></div><div><div>G-0020</div><div></div><div>First Disbursement</div></div></div>												

CAL-E-GRANTS REFERENCE GUIDE: SOCIAL ENTREPRENEURS FOR ECONOMIC DEVELOPMENT (SEED): SUBMITTING AN INVOICE IN CAL-E-GRANTS

20. If all required information has been inputted, you will receive confirmation that your invoice was submitted successfully and the status bar will update to “Submitted for Approval”	<div><div><div><div>✓</div><div>Success</div><div>Your Invoice is submitted for approval</div><div>✕</div></div></div><div><div><div>✓</div><div>Submitted for Appr...</div><div>Approved</div><div>Denied</div></div></div></div>
21. Here is a preview of what an Approved invoice will look like. You will receive an email notification notifying you of any changes to your grant.	<div><div><div><div><div></div><div>GMS Invoice</div><div>INV-0117</div></div><div><div>Submit for Approval</div><div>Edit</div><div>Delete</div></div></div></div><div><div><div><div>Grant</div><div>G-0020</div></div><div><div>Invoice Number</div><div></div></div><div><div>Disbursement Type</div><div>First Disbursement</div></div><div><div>Invoice Amount</div><div>\$50,000.00</div></div></div><div><div><div><div>✓</div><div>✓</div><div>Approved</div><div>Denied</div></div></div></div></div></div>