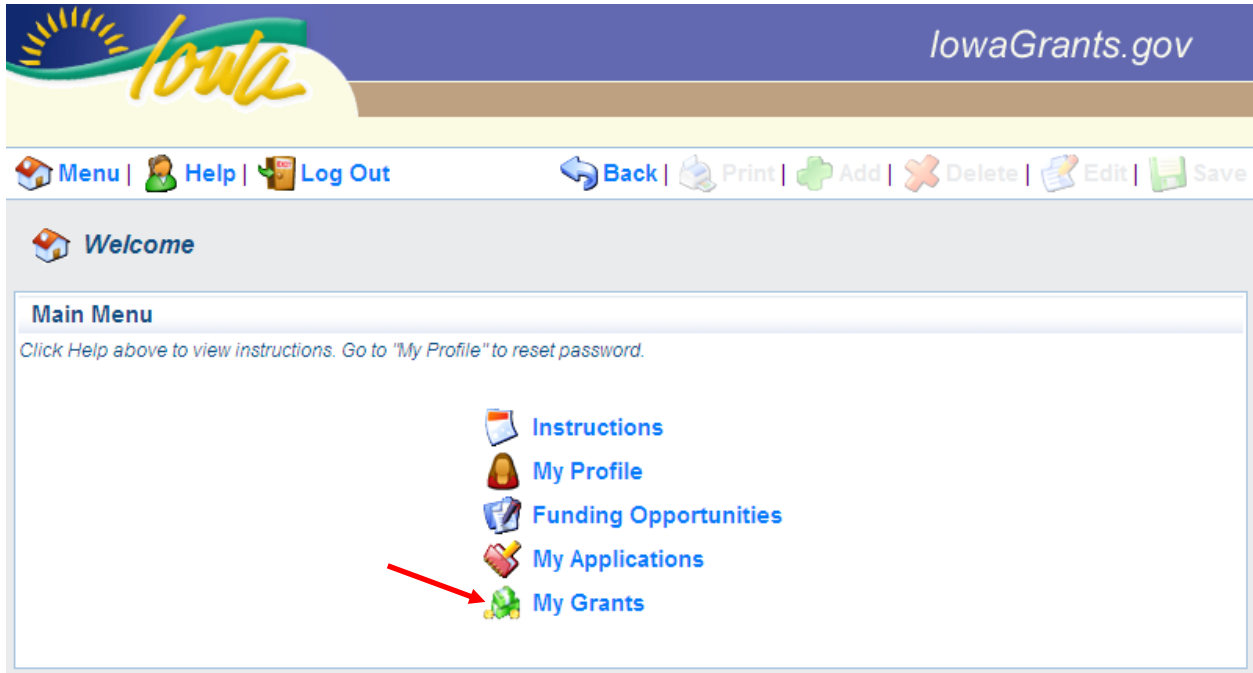


FY12 Perkins Continuation Grant: Claims Submission Process September 2011

- 1) Visit www.iowagrants.gov.
 - a. If you are already a registered user, access your account by selecting the “Returning Users Sign in Here” link.
 - b. If you are not a registered user, you will need to complete the registration process in order to access the site. Select the “New Users Register Here” link to register.

- 2) From the Main Menu, select “My Grants”




- 3) You will see a list of your approved grants that are currently underway. Select the name of the grant for which you wish to submit a claim.

The screenshot shows the 'Grant Tracking' page on IowaGrants.gov. It features a table titled 'Current Grants' with columns for ID, Status, Year, Name, Program Area, and Grant Amount. A red arrow points to the 'Name' column. The table lists one grant: 'Mary FY12 Perkins Basic Postsecondary Grant - Continuation Application test 4.12.11' with a grant amount of \$379,556.00. A 'Total' row shows the sum of the grant amounts.

ID	Status	Year	Name	Program Area	Grant Amount
18175	Underway	2011	Mary FY12 Perkins Basic Postsecondary Grant - Continuation Application test 4.12.11	Carl D. Perkins Career and Technical Education Act of 2006 (P.L. 109-270)	\$379,556.00
Total					\$379,556.00

FY12 Perkins Continuation Grant: Claims Submission Process September 2011

- 4) The screen that opens (shown below) will list several available components. Select the “Claims” link.

 **Grant Tracking**

Grant: 18175 - Mary FY12 Perkins Basic Postsecondary Grant - Continuation Application test 4.12.11 - 2011

Status: Underway

Program Area: Carl D. Perkins Career and Technical Education Act of 2006 (P.L. 109-270)

Grantee Organization: CTE Test Consortium




Program Officer: Tom Cooley







Awarded Amount: \$379,556.00


Grant Components

Component	Last Edited
General Information	07/19/2011
Budget Summary	09/01/2011
Claims	
Status Reports	
Modification of PS Perkins Action Plans - Missed Indicator Targets	07/19/2011
Modification of PS Action Plans - Voluntary Changes	07/19/2011
Contract Amendments	
Opportunity	-
Application	-

- 5) Once the Claims screen opens, select one of the “Add” links.

 Menu |
  Help |
  Log Out

 Back |
  Print |
  **Add** |
  Delete |
  Edit |
  Save

 **Grant Tracking**

Grant: 18175 - Mary FY12 Perkins Basic Postsecondary Grant - Continuation Application test 4.12.11 - 2011

Status: Underway

Program Area: Carl D. Perkins Career and Technical Education Act of 2006 (P.L. 109-270)

Grantee Organization: CTE Test Consortium

Program Officer: Tom Cooley

Awarded Amount: \$379,556.00


Claims [Add](#) | [Copy Existing Claim](#) | [Return to Components](#)

ID	Status	Date Submitted	Date Paid	Date From-To	Claim Amount
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FY12 Perkins Continuation Grant: Claims Submission Process September 2011

- 6) Enter the reporting period for the claim (you can ignore the “Category” field). Since the Department is requesting quarterly submissions, the following reporting periods are suggested:
- July 1, 2011 – September 30, 2011 (submit by October 31)
 - October 1, 2011 – December 31, 2011 (submit by January 31)
 - January 1, 2012 – March 31, 2012 (submit by April 30)
 - April 1, 2012 – June 30, 2012 (submit by July 31)

Once the dates are entered, select “Save” at the top of the screen.



Claim Instructions




Instructions: Each claim for reimbursement must include documentation to verify the amount requested for each line item. The documentation will also be reviewed by Department consultants to ensure the expense claimed is an allowable use of Perkins dollars.

Once the Claim forms have been completed and submitted electronically, a printed copy must be signed and mailed to the Iowa Department of Education (an original signature is needed for auditing purposes).

The signed forms should be sent to the following:

**Sue Anne Van Gundy
Accounting Technician 2
Iowa Department of Education
Grimes State Office Building
400 E 14th St
Des Moines, IA 50319-0146**

Reporting Period

 **Report Period:**  
From* to*

Category

FY12 Perkins Continuation Grant: Claims Submission Process September 2011

- 7) Once the dates are saved, you'll see a screen similar to the one shown below. Select the "Return to Components" link located in the Reporting Period bar to access the forms that must be completed regarding the claim being submitted.

Menu | Help | Log Out | Back | Print | Add | Delete | Edit | Save

Grant Tracking

Claim: 18175 - 004 **Grant Components**

Grant: [18175-Mary FY12 Perkins Basic Postsecondary Grant - Continuation Application test 4.12.11](#)

Status: Editing

Program Area: Carl D. Perkins Career and Technical Education Act of 2006 (P.L. 109-270)

Grantee Organization: CTE Test Consortium

Program Manager: Tom Cooley

Reporting Period **Return to Components**

Report Period: 06/01/2011 09/30/2011
From to

Category

Last Edited By: Thomas Cooley, 09/19/2011

FY12 Perkins Continuation Grant: Claims Submission Process September 2011

- 8) The components list shows the forms that comprise each claim submission. To view/complete a form, select its name. Note the "General Information" form is already marked as "complete." This form is populated with previously entered data, thus no edits should be needed.

Claim: 18175 - 004	Grant Components
<p>Grant: 18175-Mary FY12 Perkins Basic Postsecondary Grant - Continuation Application test 4.12.11</p> <p>Status: Editing</p> <p>Program Area: Carl D. Perkins Career and Technical Education Act of 2006 (P.L. 109-270)</p> <p>Grantee Organization: CTE Test Consortium</p> <p>Program Manager: Tom Cooley</p>	

<p>Instructions</p> <p><i>Each claim for reimbursement must include documentation to verify the amount requested for each line item. The documentation will also be reviewed by Department consultants to ensure the expense claimed is an allowable use of Perkins dollars.</i></p> <p><i>Once the Claim forms have been completed and submitted electronically, a printed copy must be signed and mailed to the Iowa Department of Education (an original signature is needed for auditing purposes).</i></p> <p><i>The signed forms should be sent to the following:</i></p> <p>Sue Anne Van Gundy Accounting Technician 2 Iowa Department of Education Grimes State Office Building 400 E 14th St Des Moines, IA 50319-0146</p>
--

Components	Preview Submit	
Name	Complete?	Last Edited
General Information	✓	09/19/2011
Reimbursement		
Perkins Basic - Reimbursement Request		
Perkins Basic - Reimbursement Documentation		

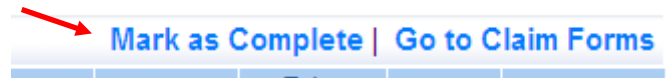
FY12 Perkins Continuation Grant: Claims Submission Process September 2011

- 9) The “Reimbursement” form is used to enter the dollar amounts of the claim by budget category. To access the entry screen for the form, select “Edit” at the top of the page (note: the first time this form is accessed, it may automatically open to the entry area).

The “Contract Budget” column lists the dollar amounts budgeted in the application for each budget category. Enter the amount being claimed under the “Expenses This Period” column. Once entered, select “Save” at the top of the screen.

Reimbursement									
Budget Category	Contract Budget	Expenses This Period	Prior Expenses (Paid)	Total Paid	Available Balance (Unpaid)	Prior Expenses (Submitted Not Paid)	Total Claimed	Remaining Balance (Unclaimed)	
Projected Amount to be Expended - Required Components									
R-1: Integration of academics and career and technical education	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	\$0.00	\$500.00	\$500.00	(\$500.00)	
R-2: Linkage of secondary and postsecondary career and technical programs	\$24,000.00	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	\$24,000.00	\$0.00	\$0.00	\$24,000.00	
R-3: All aspects of an industry	\$5,000.00	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	\$5,000.00	\$0.00	\$0.00	\$5,000.00	
R-4: Use of technology	\$5,000.00	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	\$5,000.00	\$0.00	\$0.00	\$5,000.00	
R-5: Professional development	\$35,000.00	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	\$35,000.00	\$0.00	\$0.00	\$35,000.00	
R-6: Evaluation of career and technical education program(s)	\$24,000.00	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	\$24,000.00	\$0.00	\$0.00	\$24,000.00	
R-7: Initiate, improve, expand and modernize career and technical education	\$189,578.00	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	\$189,578.00	\$0.00	\$0.00	\$189,578.00	

Once your information is entered and saved, select the “Mark as Complete” link (note: this step is needed for each form as it is completed).



- 10) The “Reimbursement Request” form (see screen shots on the following page) is used to provide a brief description of how the dollars claimed were used and to indicate who from the grantee’s entity is submitting the claim. Note this is a two part form (different steps are necessary to complete each part) :

- a. Part 1 – Claimant Information
To access the Claimant Information entry area, select “Edit” at the top of the page. Enter the requested information, then select “Save.”
- b. Part 2 – Claim Description
To access the Claim Description entry area, select the “Add” link for this section. This will open the entry screen. Select a line item for which a claim is being made, enter a brief description of how the funds were used, and select “Save.” Repeat this process for each line item for which a claim is being made.

FY12 Perkins Continuation Grant: Claims Submission Process September 2011

Menu |
 Help |
 Log Out |
 Back |
 Print |
 Add |
 Delete |
 Edit |
 Save

Grant Tracking

Claim: 18175 - 004

[Grant Components](#)

Grant: [18175-Mary FY12 Perkins Basic Postsecondary Grant - Continuation Application test 4.12.11](#)

Status: Editing

Program Area: Carl D. Perkins Career and Technical Education Act of 2006 (P.L. 109-270)

Grantee Organization: CTE Test Consortium

Program Manager: Tom Cooley

Instructions

Enter information regarding the use of the funds claimed for reimbursement. **Note: This is a two-part form; follow the instructions carefully!**

Claim Description

[Mark as Complete](#) |
 [Go to Claim Forms](#) |
 [Add](#)

Budget Line Item	Briefly describe how the funds claimed for this line item were used by the recipient.
------------------	---

Claim Description

Budget Line Item*

Use the drop down menu to select the budget line item for which a claim is being submitted.

Briefly describe how the funds claimed for this line item were used by the recipient.*

Note: Supporting documentation for the claim (e.g., POs, invoices, and warrants) must be maintained locally and be accessible for monitoring purposes.

Part 2
(access by selecting Add)

[Return to Top](#)

Claimant Information

Claimant's Name*

Enter the name of the person submitting the claim.

Claimant's Title*

Enter the title of the person submitting the claim.

Claimant's Phone Number*

Enter the phone number of the person submitting the claim.

Claimant's Email address*

Enter the Email address of the person submitting the claim.

Date*

Enter the date of submission.

Part 1 (access by selecting Edit)

Once all entries for this form are saved, select "Mark as Complete."

[Mark as Complete](#) |
 [Go to Claim Forms](#)

FY12 Perkins Continuation Grant: Claims Submission Process September 2011

11) The "Reimbursement Documentation" form is used to attach supporting documentation related to the claim. To open the attachment screen, select "Add" at the top of the page.

Locate the supporting document (saved on your computer) to be attached by selecting the "Browse" button, then enter a brief description of the document and select "Save" at the top of the page. Repeat this process until all supporting documents have been attached.

Menu | Help | Log Out | Back | Print | **Add** | Delete | Edit | Save

Grant Tracking

Claim: 18175 - 002 [Grant Components](#)

Grant: 18175-Mary FY12 Perkins Basic Postsecondary Grant - Continuation Application

Perkins Basic - Reimbursement Documentation [Mark as Complete](#) | [Go to Claim Forms](#)

Each claim for reimbursement must be supported by adequate documentation. The list below describes the information the supporting documentation must provide:

- For purchases, name of the vendor, date of purchase, and amount of expense must accompany all requests for reimbursement or payment.
- For salaries and wages, the name of the person paid, the person's job classification, the amount paid, and the time period paid for. For travel reimbursement, a description of what the expense was for, who it was for, and the amount.
- For any other payments, the information provided needs to describe where the money went, what it was for, and when it was spent.

The documentation containing the above information can be submitted in any format (e.g., summary report from the reporting entity's accounting system, spreadsheet, copy of invoices, etc.)

To attach a supporting document, select "Add" at the top of the screen; this will open a submission form at the bottom of the screen. Within the "Description" box, include reference to the budget line item(s) for which the attachment applies. Once the document is located through the "Browse" menu and the description is completed, select "Save" at the top of the screen.

To edit a description once saved, or to delete an attachment, select the attachment's description. This will open the item for editing and also provide a "Delete" option.

After all supporting documents have been attached, select the "Mark as Complete" link in the Perkins Basic - Reimbursement Documentation" bar above.

Description	File Name	File Size
-------------	-----------	-----------

Upload File:

Description:*

FY12 Perkins Continuation Grant: Claims Submission Process September 2011

- 12) Once saved, the attached documents (file name) and their descriptions will appear in a list format, similar to what is shown below:

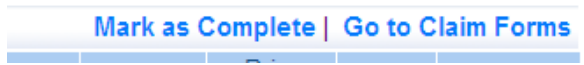
To attach a supporting document, select "Add" at the top of the screen; this will open a submission form at the bottom of the screen. Within the "Description" box, include reference to the budget line item(s) for which the attachment applies. Once the document is located through the "Browse" menu and the description is completed, select "Save" at the top of the screen.

To edit a description once saved, or to delete an attachment, select the attachment's description. This will open the item for editing and also provide a "Delete" option.

After all supporting documents have been attached, select the "Mark as Complete" link in the Perkins Basic - Reimbursement Documentation" bar above.

Description	File Name	File Size
Supporting document for R-1 claim.	Example Claim Summary.pdf	193 KB

Once all supporting attachments have been added to this form, select "Mark as Complete."



- 13) Once all claim components have been filled out and marked as complete, you are ready to submit the claim. From the components list screen (see Step 8), you will see two options: Preview and Submit.

First, select "Preview." This will show a summary of the information contained within the claim. You will need to print this form (use the "Print" icon at the top of the page), sign it, and mail a copy to Sue Ann Van Gundy at the Iowa Department of Education.

Components		(1) → Preview Submit
Name	Complete?	Last Edited
General Information	✓	09/19/2011

The claimant must print, sign, and mail this form to the following:

Sue Anne Van Gundy
Accounting Technician 2
Iowa Department of Education
Grimes State Office Building
400 E 14th St
Des Moines, IA 50319-0146

Person completing the claim forms signs the printed copy and mails it to the DE.

The claimant's original signature must be on file for auditing purposes; faxed and scanned copies are not allowed.

Claimant's Original Signature
Date

09/06/2011
Enter the date of submission.

FY12 Perkins Continuation Grant: Claims Submission Process September 2011

Second, select "Submit." This will open a verification screen that asks for the name of the person submitting the claim. Once this is completed and saved, the electronic submission process is complete. Again, make sure a signed hard copy of the claim summary is sent to Sue Ann Van Gundy at the Iowa Department of Education.

Components			Preview	Submit
Name	Complete?	Last Edited		
General Information	✓	09/19/2011	(2)	

Questions regarding the claims submission process can be directed to the following:

Tom Cooley, Administrative Consultant (515-281-4700 or tom.cooley@iowa.gov)