## EXTERNAL USER- GRANTEES FOR THE CASF INFRASTRUCTURE PROGRAM SUBMITTING A CLAIM FOR A GRANT

This guide can be used to accompany the "<u>eCAP-CASF-Grantee-Claim-Submissions</u>" video for CASF Grantees filing claims using the electronic Claim and Application Portal (eCAP).

Effective September 26, 2023, the CASF program is now using the <u>Electronic Claims and Applications Portal (eCAP)</u>, an electronic system for CASF grantees to submit payment requests to the CPUC, replacing paper based-submissions. If you do not already have an eCAP account, CASF Infrastructure staff will create one for you and send your login ID and password after your resolution has been approved.

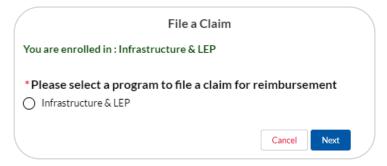
To submit a claim for review and approval by the appropriate CASF Program Staff, log into your eCAP Account. Since Grantees for the Infrastructure and Line Extension Programs are generally Service Providers regulated by the CPUC, the homepage will appear like this:



As this is a shared portal with other Public Purpose Programs such as the California Teleconnect Fund (CTF), there are features for CTF that can be ignored by Infrastructure Grantees.

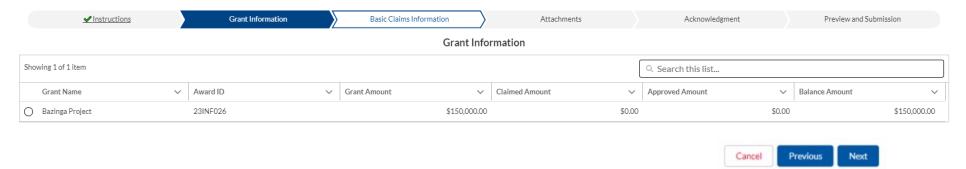
1. On the right side of the page, click "File a Claim" to begin the claim process.

2. Select the appropriate program to submit a claim and click "Next". If a Grantee has a Grant(s) for more than one program, such as Adoption, those will also appear. Also, if the entity is enrolled in another PPP such as CTF or LifeLine those options will also appear.

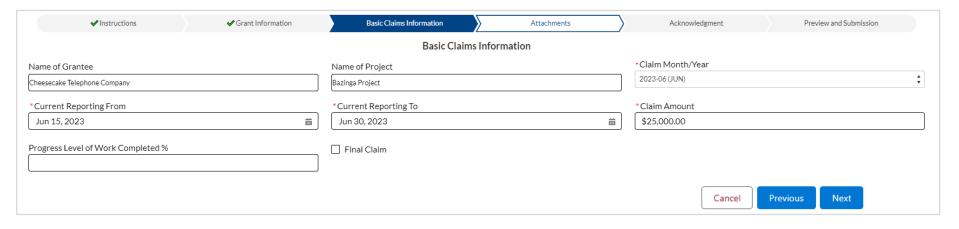


- 3. The Instructions Page appears. As mentioned in the video, **eCAP-CASF-Grantee-Claim-Submissions** each CASF program will have a different set of instructions based on its requirements. Review the instructions provided and click "Next" to move to the Grant Information tab.
- 4. The Grant Information page will display all on-going Grants for that Grantee based on the program selected in Step 2. The columns shown indicate the following:
  - a. Grant (Project) Name
  - b. Award ID (Grant ID)
  - c. Grant Amount
  - d. Claimed Amount (shows the amount of claim already submitted for a Grant that is submitted and in review by CASF staff).
  - e. Approved Amount
  - f. Balance Amount (remaining Grant Amount)

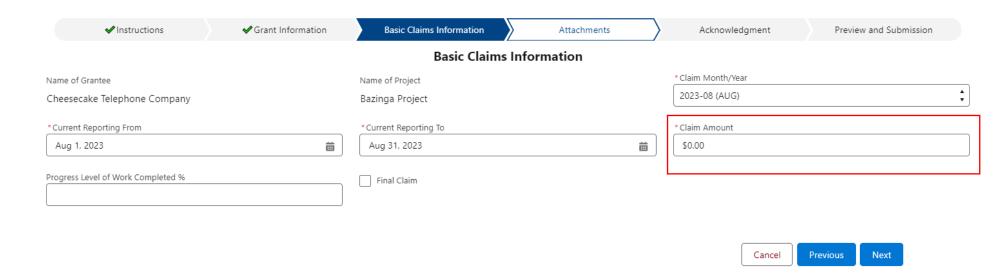
Select the appropriate Grant and click "Next".



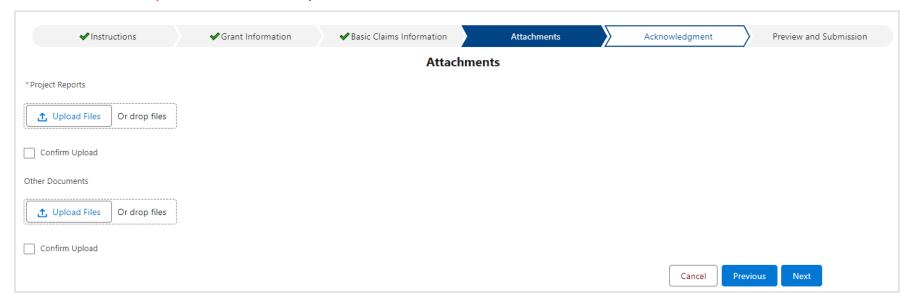
5. On the Basic Claims Information page, enter the claim details. There may be slight differences based on the specific program. For example, for Tribal Technical Assistance, there is a checkbox if a Travel Expense Claim is included, and for Adoption, the Claim Month/Year field is not present. Click "Next" when completed.



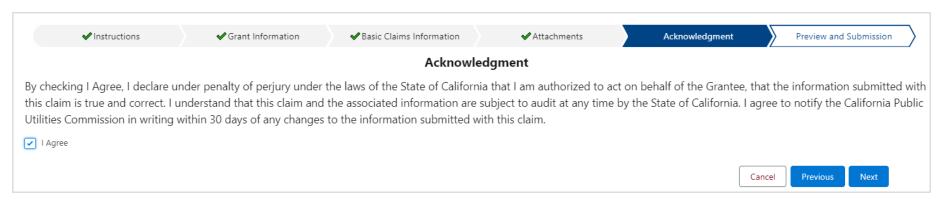
6. If a Grantee is required to submit a stand-alone report as part of the Grant requirements, then enter \$0.00 as the amount in the Claim Amount field. The system will still create a claim record, but this will allow Grantees to submit reports to meet reporting requirements. Click "Next" when completed.



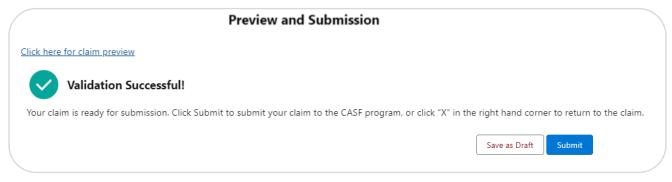
7. On the Attachments page upload the required document(s) needed to submit the claim (indicated with an \*) and check the box to confirm the document has been attached. If any of the boxes are not checked, a message will appear, "Check this box after file is uploaded". When completed, click "Next".



8. On the Acknowledgement page, read and check the box to agree to the Terms and Conditions. Click "Next".



9. Once the Acknowledgment has been verified, a "Validation Successful" message will appear. At this point, a preview of the claim can be downloaded, or the claim can be saved as a draft for later submission or submitted for review and approval.



## Save as Draft:

10. A claim can be created and saved as a draft to be edited and submitted at a later date. If "Save as Draft" is clicked, the following message appears:



- No: Returns to the Preview and Submission page.
- Yes: Navigates to a claim details page. The claim can be edited and saved as a draft, or click "Validate and Submit".

Edit Claim

Validate and Submit

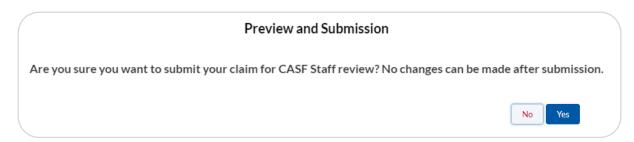
## Claim Details page:

Details Documents			
Claim Number	00031746	Account	Cheesecake Telephone Company
Subject	CASF - Infrastructure & LEP	Claim Month & Year	2023-06 (JUN)
Status	✓ Submitted	Claim Amount	\$25,000.00
Sub Status	Pending Infrastructure & LEP Analyst Review	Disallowance Amount	
Final Claim		Approved Amount	\$0.00
Current Reporting From	6/14/2023	Current Reporting To	6/29/2023
Progress Level of Work Completed %		Submitted On	9/19/2023 11:46 AM
Comments		Award ID	23INF026
Project	Bazinga Project	Disallowance Reason	
Created By	Penny Cooper	Created By	9/14/2023 2:18 PM
•	Penny Cooper	Last Modified By	9/19/2023 11:47 AM
Last Modified By	. c, ocopa	Last Mounted by	.,,

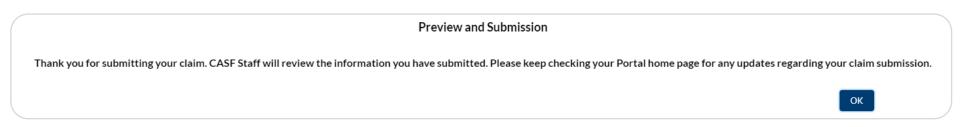
<sup>\*</sup>There is no time limit on how long a claim can remain as a draft before it must be submitted. <u>A claim can remain in "Draft" status indefinitely</u>.

## Validate and Submit:

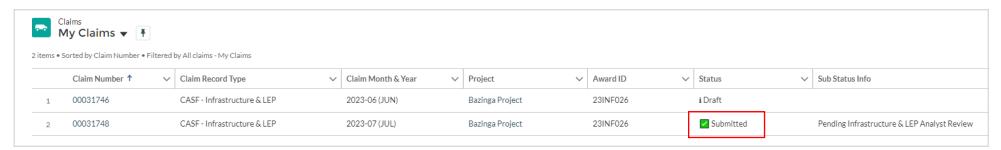
11. Click "Yes" to submit the claim for CASF review.



After the claim is submitted a confirmation message will appear. Click "OK" to return to the homepage.



12. The claim details appear with a status of Submitted. Click the Home link to return to the list of claims.



13. A Notification is sent and can be viewed by clicking the Bell icon. An email will also be sent to the email address on file for the Grantee's account.

