



## Portland Children's Levy – WebGrants Guide for Grantees

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### **1. What is WebGrants?**

WebGrants is the online grants management system for the City of Portland. If you are awarded a Portland Children's Levy grant, you will need to manage the grant in WebGrants. Multiple people can register under your organization and access your grant.

If you need an Americans with Disabilities (ADA) accommodation or are having trouble with WebGrants, please reach out to [info@portlandchildrenslevy.org](mailto:info@portlandchildrenslevy.org) with "WebGrants" in the subject line. PCL staff will be happy to help.

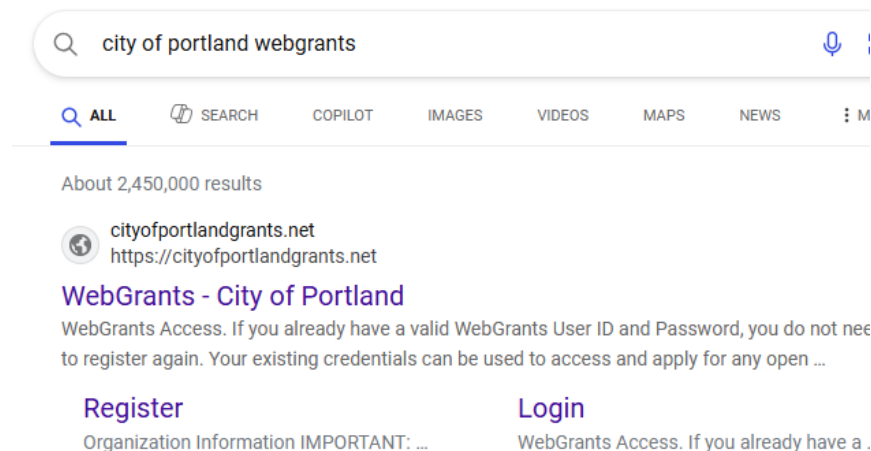
## 2. What you can do in WebGrants

There are a number of important reasons to use WebGrants:

- a. Submitting invoices – you will submit your invoices for quarterly reimbursement through WebGrants.
- b. Submitting reports – mid-year and annual progress reports will be submitted through WebGrants.
- c. Signed grant contracts – once the contract is signed by both your organization and the City, your grant contract will be available in WebGrants.
- d. Approved budget – once the budget is approved, a copy of it will be available in WebGrants.
- e. Other documentation (insurance certificates, evaluation methods, annual performance summaries) – other documentation will be saved in WebGrants and available for review and download from the system.

## 3. How to navigate to WebGrants

To access WebGrants, go to the link [cityofportlandgrants.net](https://cityofportlandgrants.net) or Google “City of Portland WebGrants.”



## 4. How to register in WebGrants

### Who should register?

Members of your organization who will need to create, edit, review, or upload invoices or program reports for your grant should register as a user. Once they are registered, a user who was originally associated with the application can give them permission to access the grant.

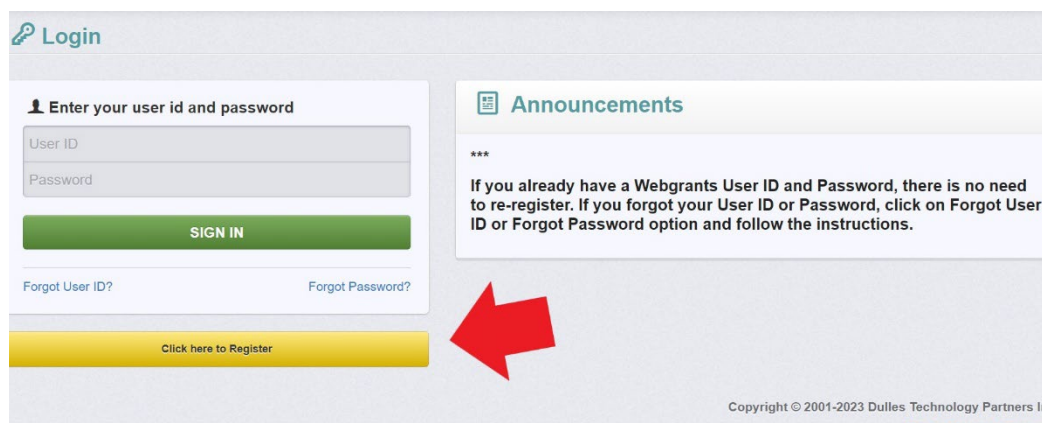
***Please note: Anyone with WebGrants access to your grant can see and download your approved PCL budget and budget justification.*** The budget and/or the budget justification include salary details that you may want to keep confidential. Please keep this in mind when choosing whom to register to use WebGrants.

If you have already registered in WebGrants for a different City of Portland bureau's grant process (e.g., the Portland Clean Energy Fund or the Office of Violence Prevention's Gun Violence Reduction Program) you do not need to re-register, you can use your existing account – to learn more, skip to page 10, [“How to give a registered user access to your PCL grant.”](#)

### Steps to register a user

Using a computer, go to [cityofportlandgrants.net](http://cityofportlandgrants.net) in any web browser. WebGrants does not work well on a phone.

Click the yellow “click here to register” button:



This will take you to the registration screen. There will be two sections to fill out: personnel information and organizational information.

## Personnel Information

- Fill out your work contact information for your name, address, title, email address, and phone. All the questions with a red label require an answer.

Personnel Contact Information

**Name\*:**  First Name  Middle  Last Name  
First Name Middle Name Last Name

**Title\*:**  Title

**Email\*:**  Email

**Address\*:**  Address 1  
 Address 2  
 Address 3  
 City  Oregon  Zip  
City State/Province Postal Code/Zip

**Phone\*:**  Phone  Ext.  
Phone Ext.  
###-###-####

**Fax:**  Fax  
###-###-####

What Program are you most interested in? This information is used in order to process your registration purposes only and does not restrict your ability to apply for other programs.

**Program Area of Interest\*:**

Copy Personnel Information to Organization?:

- Email – please carefully enter your email address. All WebGrants correspondence, including your login and password information, will be sent to the email address you enter here.
- Program area of interest – this is a drop-down menu with several options for City grant programs. Select “PCL - Portland Children’s Levy” so PCL staff receive an alert to approve your registration. Choosing PCL on this menu will not restrict you from applying for other future City of Portland grants.

What Program are you most interested in? This information is used in order to process your registration purposes only and does not restrict your ability to apply for other programs.

**Program Area of Interest\*:**

Copy Personnel Information to Organization?:

**Organization Information**

IMPORTANT: Check YES that you are affiliated with an organization you can conduct business on its behalf within the City of Portland. Your profile will be linked to that Organization so you can apply for grants.

**Are you Affiliated with an Organization\*:**

**Name\*:**


Select "PCL - Portland Children's Levy"

- Click yes on “Copy personnel information to organization” to copy your work address and phone number into the organization section below.

## Organization Information

- Affiliation - **You must check “yes”** on “are you affiliated with an organization?” to enter your organization’s information below. Your grant will exist in the organization’s record, and your profile’s affiliation with the organization record is how you access the grant. Individuals who are not affiliated with an organization cannot access any PCL funded grants in WebGrants.

IMPORTANT: Check YES that you are affiliated with an Organization and enter the details for the Organization you represent which intends to apply for grant funds you can conduct business on its behalf within this grant system.

Are you Affiliated with an Organization?: ☒ Yes ☐ No 

Name\*:

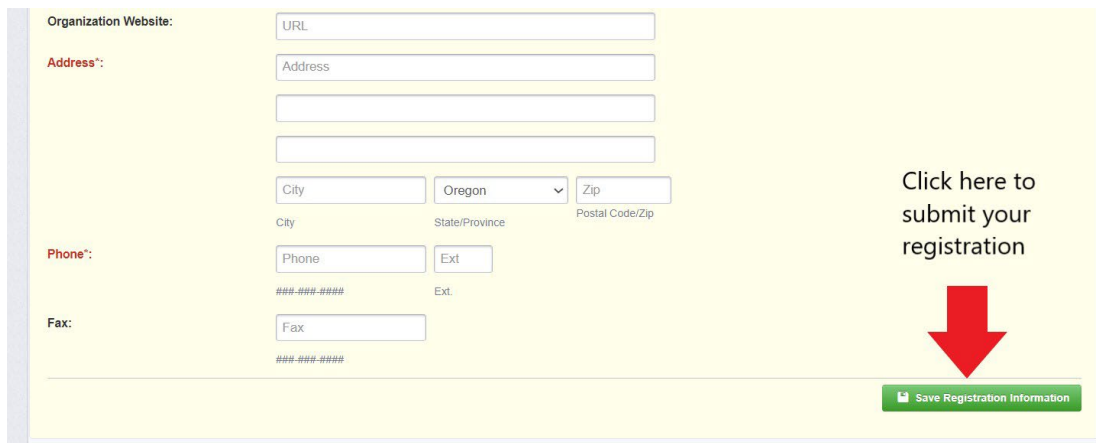
Organization Type\*:

Tax Id\*:

Organization Website:

- Organization name: Please spell out the organization’s name instead of only using acronyms.
- Organization Type: Select the organization type that applies to your organization. If you are not sure of the answer, select “non-profit organization.”
- Tax ID: This is your federal EIN or Tax ID number found on your 501(c)(3) IRS letter. If you do not know this information, please enter "N/A". PCL staff can update this information later.
- Organization website: This field is optional. If you do enter information, the system will only accept answers that start with “http://” as valid. We recommend you either copy and paste your website from your browser’s address bar or leave this field blank.

To **submit your registration**, click the green “save registration information” button in the bottom right-hand corner.



Organization Website:


Address\*:


City:  Oregon   
City State/Province Postal Code/Zip

Phone\*:    
###-###-#### Ext.

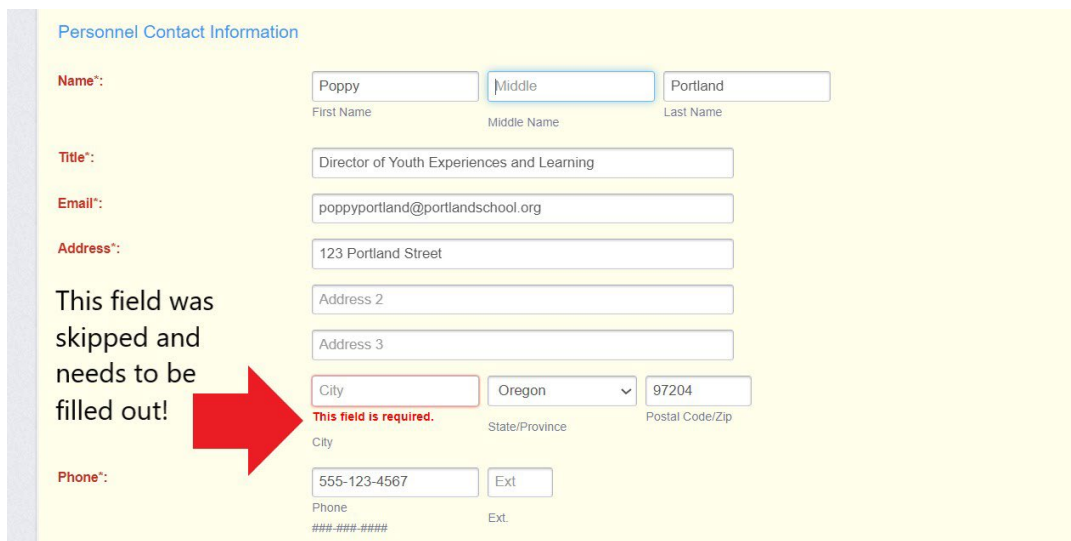
Fax:   
###-###-####

Click here to submit your registration





If you click the green “save registration information” button and nothing happens, scroll back up and check for any red “this field is required” alerts on answers that you might have skipped.



Personnel Contact Information

Name\*:     
First Name Middle Name Last Name

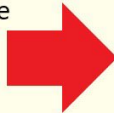
Title\*:

Email\*:

Address\*:

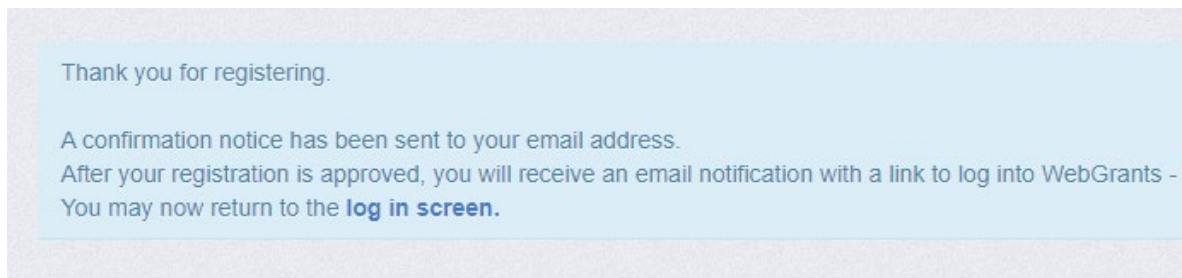
City:  Oregon   
City State/Province Postal Code/Zip

Phone\*:    
###-###-#### Ext.

This field was skipped and needs to be filled out! 

**This field is required.**

If you successfully submit your registration, you will be taken to this screen that says “thank you for registering”:

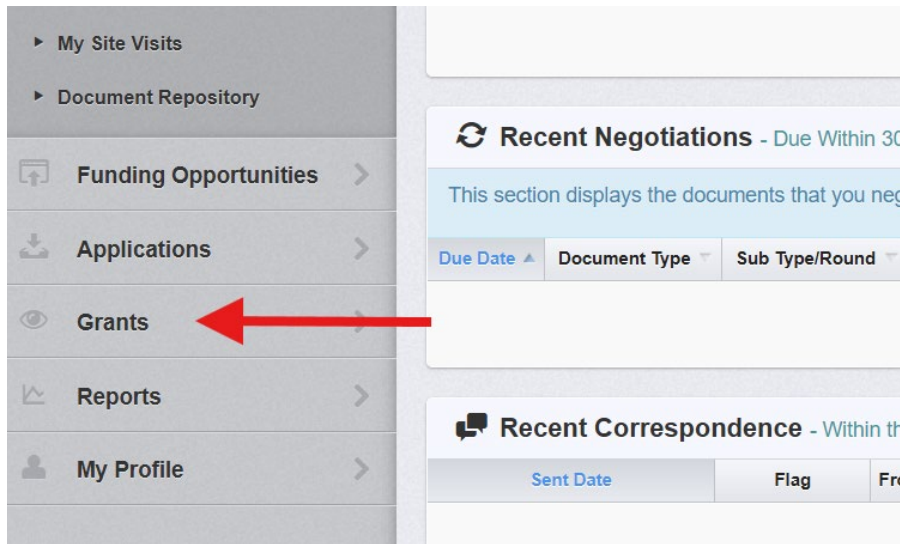


You will receive an automated email confirming your registration was submitted. If you do not see this email, please check your spam folder. If you still don't see the email after 30 minutes, please contact PCL staff at [info@portlandchildrenslevy.org](mailto:info@portlandchildrenslevy.org) with “WebGrants registration” in the subject line to confirm the email address in your registration record is correct.

Once PCL staff approves your registration, you will receive an automated email from WebGrants with your login and password. Then you may login to WebGrants.

## 5. How to find your PCL grant

When you log onto WebGrants, you are taken to the generic dashboard, which shows your upcoming deadlines. To navigate to your grant, click on the toolbar on the left-hand side of the screen that says “Grants.”



This will take you to your active grants list. If your user account is linked with more than one City of Portland grant from your organization, then you will see multiple grants listed here. Navigate to the appropriate PCL grant and click on the row to enter the grant components screen.


Current Grants					
Current Grants					
All active grants are listed below.					
ID	Status	Year	Title	Organization	Program Area
8917	Underway	2025	TEST - demonstration for PCL team 4.9.25	BaseLine Organization	PCL-Portland Children's Levy
8981	Underway	2025	For Screenshot demonstration	BaseLine Organization	PCL-Portland Children's Levy



This will take you to the Grant components screen, where you will see the grant summary at the top, and then the menu for all the different activities you can do in the grant – such as viewing your budget, submitting an invoice, or filling out a progress report.


Awarded Amount:	\$693,000.00
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 **Grant Components**

The grant forms appear below.

Component
General Information
Contract and Grant Documents
Annual Grant Budget
Invoicing
Mid-year and Annual Reports
Evaluation Methods Documentation
Insurance Documentation



**The forms and documents you need are listed in this menu.**

## 6. How to give a registered user access to your PCL grant

From the Grants Components screen (see above [#5, How to Find your PCL Grant](#)), click on the General Information bar.


Grant Components	
The grant forms appear below.	
Component	Last Edited
General Information	Apr 11, 2025
Contract and Grant Documents	
Annual Grant Budget	Apr 11, 2025
Invoicing	

This takes you to the General information screen. Click the green “edit additional contacts” button at the top right.

Grant List	Genera	Contra	Annual	Invoic	Mid-ye	Evalua	Insura
------------	--------	--------	--------	--------	--------	--------	--------

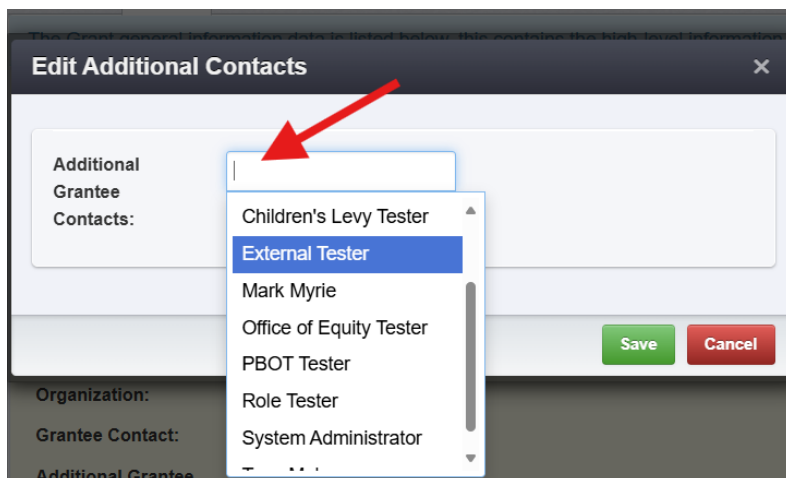
The Grant general information data is listed below, this contains the high-level information about the Grant.

### General Information

☒ Edit Additional Contacts

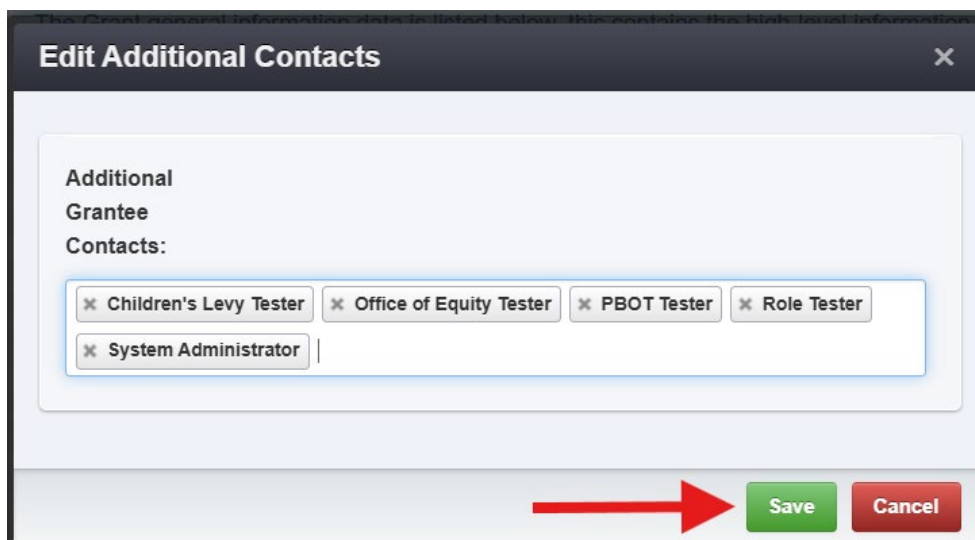
Grant Number:	8981
Title:	For Screenshot demonstration
Status:	Underway
Year:	2025
Program Area:	Portland Children's Levy
Organization:	BaseLine Organization

In the pop-up window (see screenshot on next page), click on the small empty box, and a drop-down list of names will appear – these are all the individuals who are registered and affiliated with your organization in WebGrants.



Click on each name in the drop-down menu that you want to add to the grant. You can add as many names as you need. Then click the green “save” button.

*Note: Anyone who has access to your grant can open and download your grant budget and justification, which together include individual salary information.*



**Troubleshooting:** If you can't find your colleague's name in the drop-down menu, that means they are either not registered in WebGrants, or they are registered but not affiliated with your organization.


- If they are not registered in WebGrants, follow the steps above for [“#4 How to Register in WebGrants”](#).
- If they are already registered in WebGrants, contact PCL staff at [info@portlandchildrenslevy.org](mailto:info@portlandchildrenslevy.org) and we will make sure their record is affiliated with your organization.

## 7. How to find important grant documents

Your signed contract, approved budget, and other documents will be housed in WebGrants. To access these documents, go to the Grant components screen (see [#5 How to find your PCL grant](#)), and click on the relevant menu item:

- a. Contract and Grant documents – where you will find your signed contract and other grant-related documentation.
- b. Annual grant budget – where you will find your approved annual budget.
- c. Invoicing – where you will submit invoices for reimbursement, and find your invoice history and payment records.
- d. Mid-year and annual reports – where you will find and submit your grant’s progress reports. All of your past and in-progress reports will be saved in this section.
- e. Evaluation methods documentation – PCL will upload your approved evaluation methods documentation here.
- f. Insurance documentation – PCL will upload your approved insurance documentation here.

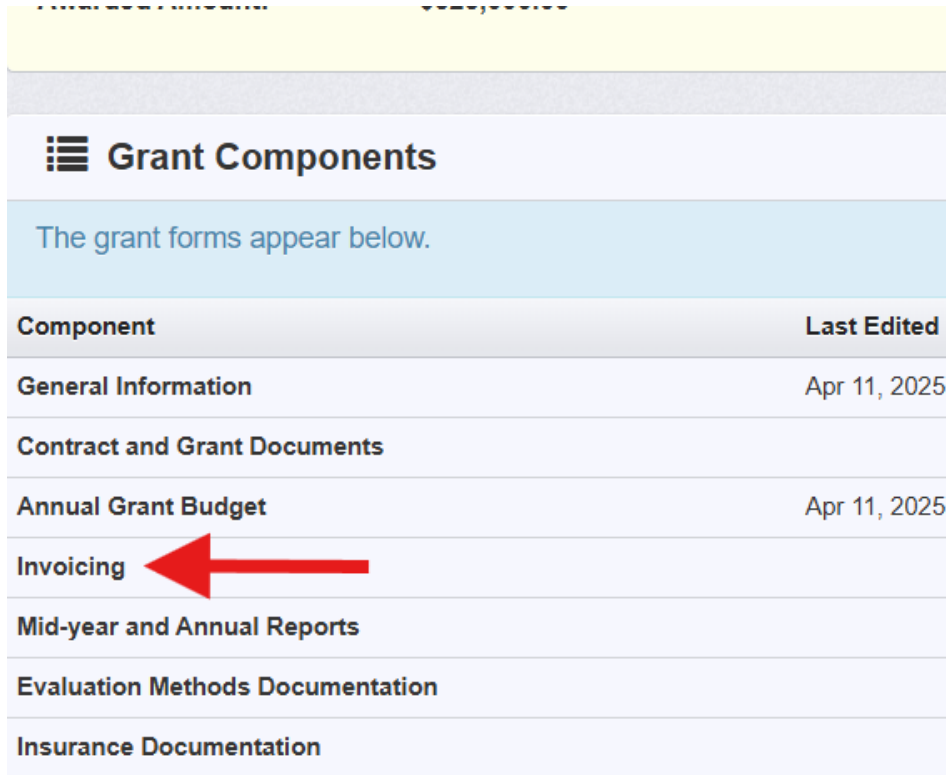
☰ Grant Components	
The grant forms appear below.	
Component	Last Edited
General Information	Apr 11, 2025 10:1
Contract and Grant Documents	
Annual Grant Budget	Apr 11, 2025 10:1
Invoicing	
Mid-year and Annual Reports	
Evaluation Methods Documentation	
Insurance Documentation	



**your documents  
live in these  
menu items**

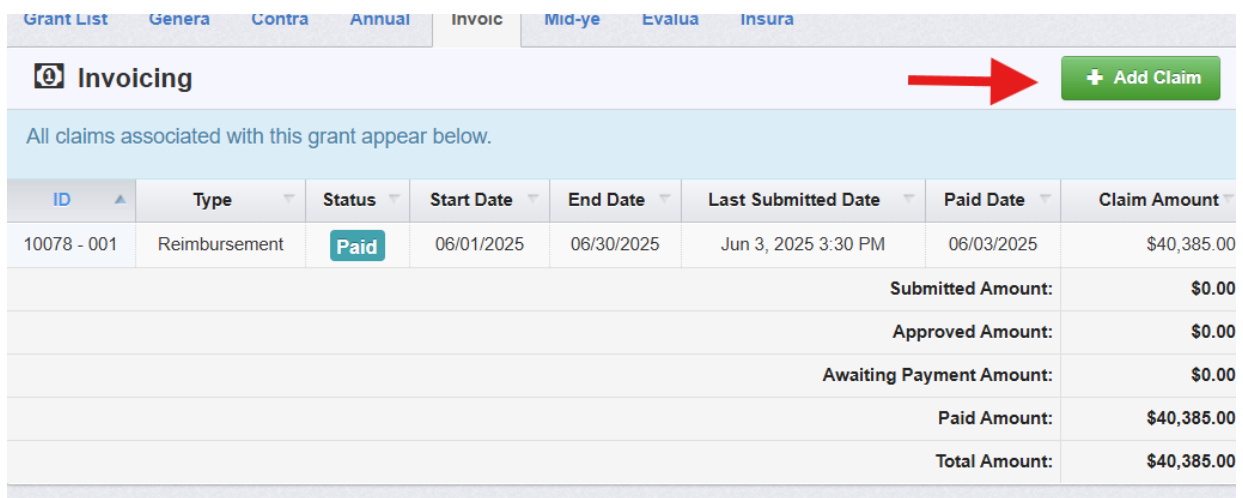
## 8. How to submit an invoice for reimbursement

Navigate to your grant. At the Grant Components screen (see [#5, How to find your PCL grant](#)”), click on the bar that says “Invoicing.”



Grant Components	
The grant forms appear below.	
Component	Last Edited
General Information	Apr 11, 2025
Contract and Grant Documents	
Annual Grant Budget	Apr 11, 2025
<b>Invoicing</b>	
Mid-year and Annual Reports	
Evaluation Methods Documentation	
Insurance Documentation	

The invoice screen shows you a financial summary of previously submitted claims and the status of claims (submitted, approved, awaiting payment, and paid). To submit a new invoice, click the green “Add Claim” button at the top right.



Grant List	Genera	Contra	Annual	Invoic	Mid-ye	Evalua	Insura
Invoicing							
All claims associated with this grant appear below.							
ID	Type	Status	Start Date	End Date	Last Submitted Date	Paid Date	Claim Amount
10078 - 001	Reimbursement	Paid	06/01/2025	06/30/2025	Jun 3, 2025 3:30 PM	06/03/2025	\$40,385.00
Submitted Amount:							\$0.00
Approved Amount:							\$0.00
Awaiting Payment Amount:							\$0.00
Paid Amount:							\$40,385.00
Total Amount:							\$40,385.00

This takes you to the claim form. The claim serves as your grant invoice, along with the expense report and supporting documentation. You will upload this information into the system here. Set the type to “reimbursement,” include the start and end dates for the fiscal quarter, and click “no” for final request. Then click the green “save form” button.

**General Information - Claim - Edit** Save Form

In the form below, complete all required fields. Enter the report period of coverage for this claim. All expenses reported on this claim should have been incurred during this period of time. If this is the last claim that will be submitted for this grant, then the Final Request checkbox should be checked.

**Status\*:**

**Type\*:** Reimbursement

**Report Period:** 07/01/2025 09/30/2025  
Start Date End Date

**Final Request?\*:** Yes No  
Click Yes if this is the final request

This takes you to the Claim Details form. You will have to fill out the two tabs called “Reimbursement” and “PCL Expense Report and Supporting Documentation.” Click on “Reimbursement.”

Claim Preview Attachments Alert History Map

**Claim Details** Preview Claim

**Claim cannot be Submitted Currently**  
• Claim components are not complete

Component	Complete?	Last Edited
General Information	✓	Jun 3, 2025 3:38 PM - Children's Levy Tester
Reimbursement		-
PCL Expense report and Supporting Documentation		-





This takes you to the Reimbursement screen, where you enter the financial totals for each of the four budget categories – Personnel, Contracted Program Services, Program Expenses, and Administrative. Click on the green “Edit Reimbursement” button and then fill out the four amounts under “Expenses This Period” and click the green “Save Reimbursement” button.

Reimbursement - Current Version								
Reimbursement								
Budget Category	Contract Budget	Expenses This Period	Prior Expenses (Paid)	Total	Available Balance (Unpaid)	Prior Expenses (Submitted Not Paid)	Total Claimed	Remaining Balance (Unclaimed)
FY26 Budget								
FY26 Program Personnel	\$100,000.00	\$0.00	\$47,500.00	\$47,500.00	\$52,500.00	\$0.00	\$47,500.00	\$52,500.00
FY26 Contracted Program Services	\$25,000.00	\$0.00	\$16,000.00	\$16,000.00	\$9,000.00	\$0.00	\$16,000.00	\$9,000.00
FY26 Other Program Expenses	\$15,000.00	\$0.00	\$8,500.00	\$8,500.00	\$6,500.00	\$0.00	\$8,500.00	\$6,500.00
FY26 Administrative Expenses	\$15,000.00	\$0.00	\$8,650.00	\$8,650.00	\$6,350.00	\$0.00	\$8,650.00	\$6,350.00


Reimbursement - Edit								
Budget Category	Contract Budget	Expenses This Period	Prior Expenses (Paid)	Total	Available Balance (Unpaid)	Prior Expenses (Submitted Not Paid)	Total Claimed	Remaining Balance (Unclaimed)
FY26 Budget								
FY26 Program Personnel	\$100,000.00	22450	\$47,500.00	\$47,500.00	\$52,500.00	\$0.00	\$47,500.00	\$52,500.00
FY26 Contracted Program Services	\$25,000.00	6222	\$16,000.00	\$16,000.00	\$9,000.00	\$0.00	\$16,000.00	\$9,000.00
FY26 Other Program Expenses	\$15,000.00	3000	\$8,500.00	\$8,500.00	\$6,500.00	\$0.00	\$8,500.00	\$6,500.00
FY26 Administrative Expenses	\$15,000.00	3458	\$8,650.00	\$8,650.00	\$6,350.00	\$0.00	\$8,650.00	\$6,350.00
	\$155,000.00	\$0.00	\$80,650.00	\$80,650.00	\$74,350.00	\$0.00	\$80,650.00	\$74,350.00

Then click the orange “mark as complete” button. **You must mark both the Reimbursement form and the Expense Report and Supporting Documentation form (see below) as “complete” before you can submit the invoice.**

 **Reimbursement** - Current Version

<div>  <b>Reimbursement</b> <div> <input checked="" type="button" value="✓ Mark as Complete"/> <input type="button" value="✎ Edit Reimbursement"/> </div> </div>									
Budget Category	Contract Budget	Expenses This Period	Prior Expenses (Paid)	Total	Available Balance (Unpaid)	Prior Expenses (Submitted Not Paid)	Total Claimed	Remaining Balance (Unclaimed)	
<b>FY26 Budget</b>									
FY26 Program Personnel	\$100,000.00	\$22,450.00	\$47,500.00	\$69,950.00	\$30,050.00	\$0.00	\$69,950.00	\$30,050.00	
FY26 Contracted Program Services	\$25,000.00	\$6,222.00	\$16,000.00	\$22,222.00	\$2,778.00	\$0.00	\$22,222.00	\$2,778.00	
FY26 Other Program Expenses	\$15,000.00	\$3,000.00	\$8,500.00	\$11,500.00	\$3,500.00	\$0.00	\$11,500.00	\$3,500.00	

When you have marked a form as complete, it shows up with a check mark in the Claim Details screen:


<div> <div>Claim Preview</div> <div>Attachments</div> <div>Alert History</div> <div>Map</div> </div>		
<div>  <b>Claim Details</b> </div>		
<div> <div>Claim cannot be Submitted Currently</div> <ul style="list-style-type: none"> <li>Claim components are not complete</li> </ul> </div>		
Component	Complete?	Last Edited
General Information	✓	May 27, 2025 2:41 PM
Reimbursement	✓	May 27, 2025 2:51 PM
PCL Expense report and Supporting Documentation	-	

Now click on “PCL Expense report and Supporting Documentation.”


<div> <div>Claim Details</div> </div>		
<div> <div>Claim cannot be Submitted Currently</div> <ul style="list-style-type: none"> <li>Claim components are not complete</li> </ul> </div>		
Component	Complete?	Last Edited
General Information	✓	May 27, 2025 4:09
Reimbursement	✓	Jun 3, 2025 10:12
PCL Expense report and Supporting Documentation		May 27, 2025 4:27




In this screen, you will need to upload your quarterly expense report and your supporting documentation for the expense report. Click on the link under “Named Attachment” for each and upload the document in the pop-up window. Please see the [PCL Financial webpage](#) for the form and instructions.



**Expense Report & Supporting Documentation** - [Named Attachments](#)



Upload your quarterly expense report and supporting documentation here.

Named Attachment	Required	Description	File Name 	Type
<a href="#">Quarterly Expense Report</a>	✓			
<a href="#">Supporting Documentation</a>	✓			




In the pop-up window, upload the file, type in the name of the person submitting the invoice, and then click the green “save file” button.




**Attach File**

**1.**


Upload File\*:
 


 Super Real Not At All Fake Q1 Expense Re
 

**Description\*:**

Submitted by Buffy Summers
 



474 character(s) left

**2. enter your name**

**3.**

Upload both the quarterly expense report and the supporting documentation, and then click the “Mark as Complete” button. In the description field, enter “submitted by (your name).”

**Reminder: You must mark both the Reimbursement form and the Expense Report and Supporting Documentation form as “complete” before you can submit the invoice.**

✓ Mark as Complete

Upload your quarterly expense report and supporting documentation here.

Named Attachment	Required	Description	File Name	Type	Size	Upload Date	Delete?
Quarterly Expense Report	✓	submitted by Buffy Summers	Super Real Not At All Fake Q1 Expense Report.xlsx	xlsx	41 KB	06/03/2025 10:15 AM	<span>Delete</span>
Supporting Documentation	✓	Submitted by Buffy Summers	Super Real Not At All Fake Q1 Supporting Documentation.pdf	pdf	73 KB	06/03/2025 10:16 AM	<span>Delete</span>

Last Edited By: Children's Levy Tester - Jun 3, 2025 10:16 AM

Once all three forms are marked as complete, the “Submit Claim” form will appear on the Claim Details screen.

If you need to edit the claim after marking it complete but before submitting it, see [Troubleshooting instructions](#) below.

The blue “Preview” button opens another screen and allows the user to view the claim in PDF form. **Warning: If you click the “withdraw” button, your entire invoice will be canceled, and you will have to start over. Only click “withdraw” if you have been instructed to do so by your grant manager.**

Click the orange "Submit Claim" button when you're ready to submit your invoice for PCL reimbursement.

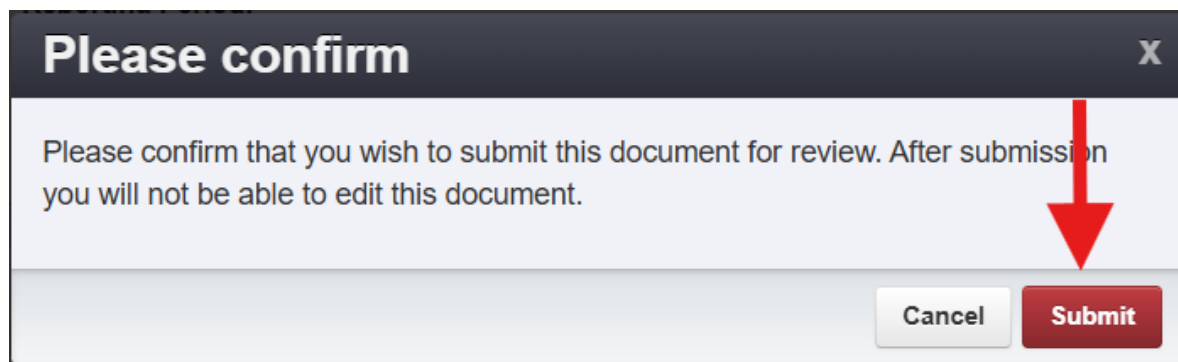
Claim Preview
Attachments
Alert History
Map

**Claim Details**
✓ Submit Claim
✕ Withdraw
🔍 Preview Claim

- Claim is in compliance and is ready for Submission!

Component	Complete?	Last Edited
General Information	✓	May 27, 2025 4:09 PM - Children's Levy Tester
Reimbursement	✓	Jun 3, 2025 10:12 AM - Children's Levy Tester
PCL Expense report and Supporting Documentation	✓	Jun 3, 2025 10:16 AM - Children's Levy Tester

You will see a pop-up message confirming that you want to submit the invoice. Click the red “Submit” button if you are ready to submit the invoice to PCL.



Once you have submitted your claim, you can see the status change to “submitted” for your claim in the summary screen. Once it has been approved by staff, you will receive an email notification showing the status has changed to “approved.” Once the city has released the funds, you will receive another email notification that the status has changed to “paid.”

If your grant manager sends the claim back to you for corrections, you will receive a notification email to log into WebGrants to edit and re-submit the claim. Your claim must be approved by your grant manager for your invoice to be paid.

Claim List	Genera	Contra	Annual	Invoice	Mid-ye	Evalua	Insura
<div> <span>🔍</span> Invoicing           <span>+ Add Claim</span> </div>							
All claims associated with this grant appear below.							
ID ▲	Type ▼	Status ▼	Start Date ▼	End Date ▼	Last Submitted Date ▼	Paid Date ▼	Claim Amount ▼
8981 - 001	Reimbursement	Paid	04/01/2025	07/31/2025	Apr 17, 2025 9:11 AM	04/18/2025	\$43,850.00
8981 - 002	Reimbursement	Submitted	07/01/2025	09/30/2025	May 27, 2025 4:01 PM		\$36,800.00
						Submitted Amount:	\$36,800.00
						Approved Amount:	\$0.00
						Awaiting Payment Amount:	\$0.00
						Paid Amount:	\$43,850.00
						Total Amount:	\$80,650.00

## Troubleshooting

1. I do not have a “submit claim” button on the Claim Details screen.

Make sure you have marked both the *Reimbursement* form and the *Expense Report and Supporting Documentation* form as “complete,” and then the submit claim button will show up.

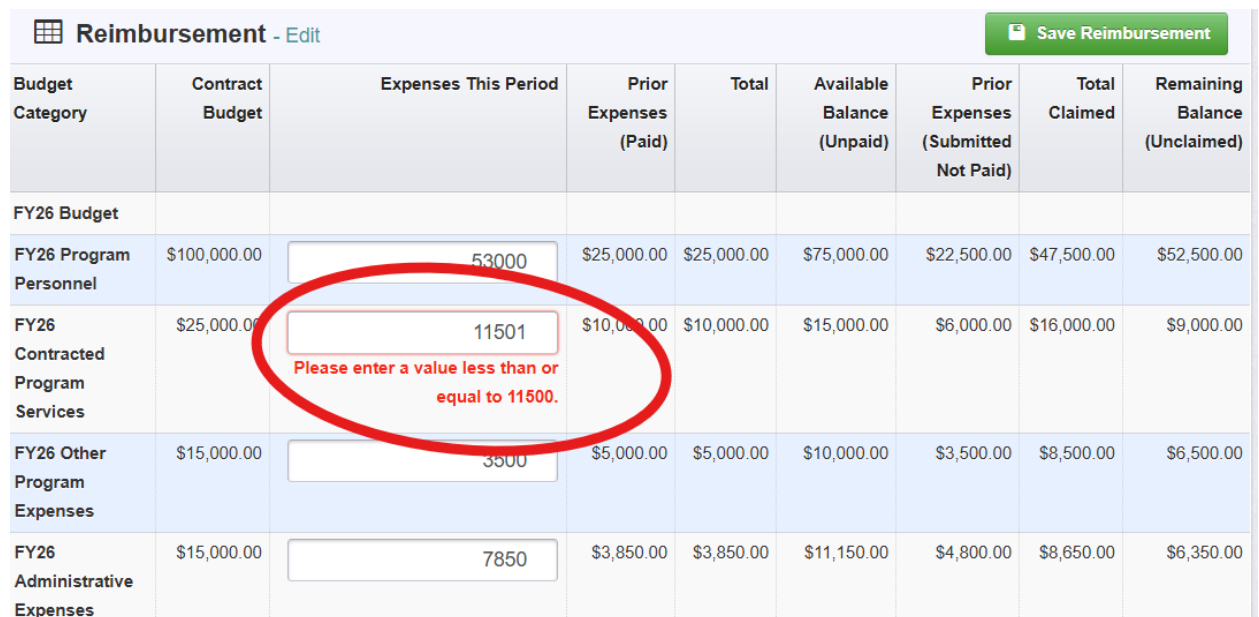
2. I marked a claim as complete, but I need to make an edit. What do I do?

You can make edits to a claim form after you mark it “complete,” if you have not submitted the claim. Click on the name of the claim form and make your edits. When you make changes to a form, it will stay marked as “complete” in the system. You have to click “save” after you make changes in the form, but you won’t ever have to mark it “complete” again.

3. I submitted the claim, but then I realized I made a mistake. I can’t make changes to the claim now, what should I do?

Contact your grant manager – they can send the invoice back to you for corrections in WebGrants. You will get an email alert from the system whenever an invoice is returned to you for adjustments.

4. In the Reimbursement form, the system is telling me to enter a value less than or equal to a smaller number. Why is that happening?

The screenshot shows the 'Reimbursement - Edit' form. It features a table with columns for Budget Category, Contract Budget, Expenses This Period, Prior Expenses (Paid), Total, Available Balance (Unpaid), Prior Expenses (Submitted Not Paid), Total Claimed, and Remaining Balance (Unclaimed). A red circle highlights the 'FY26 Contracted Program Services' row, where the 'Expenses This Period' field contains the value '11501'. A red error message is displayed below this field: 'Please enter a value less than or equal to 11500.' The 'Save Reimbursement' button is visible in the top right corner.

Budget Category	Contract Budget	Expenses This Period	Prior Expenses (Paid)	Total	Available Balance (Unpaid)	Prior Expenses (Submitted Not Paid)	Total Claimed	Remaining Balance (Unclaimed)
FY26 Budget								
FY26 Program Personnel	\$100,000.00	53000	\$25,000.00	\$25,000.00	\$75,000.00	\$22,500.00	\$47,500.00	\$52,500.00
FY26 Contracted Program Services	\$25,000.00	11501	\$10,000.00	\$10,000.00	\$15,000.00	\$6,000.00	\$16,000.00	\$9,000.00
FY26 Other Program Expenses	\$15,000.00	3500	\$5,000.00	\$5,000.00	\$10,000.00	\$3,500.00	\$8,500.00	\$6,500.00
FY26 Administrative Expenses	\$15,000.00	7850	\$3,850.00	\$3,850.00	\$11,150.00	\$4,800.00	\$8,650.00	\$6,350.00

PCL grants will only let you exceed a budget category by 10% in any fiscal year. If you see this message, that means you are trying to exceed the allowable amount for that budget category's annual total on your invoice. Either reduce the amount in the invoice budget category or contact your grant manager to request a budget revision. You may request a budget revision at any time during the year on or before May 15 of the fiscal year. Check the [PCL Financial webpage](#) for instructions on submitting a budget revision.

5. I want to do an advance instead of a reimbursement. How do I request an advance in the system?

WebGrants cannot process advances. Check the [PCL Financial webpage](#) for instructions on submitting an advance request.