

This document will guide you through creating and submitting an Invoice in the Technical Assistance and Grant Management Equity Portal, [“Equity Portal”](#).

California Department of Public Health

Office of Health Equity

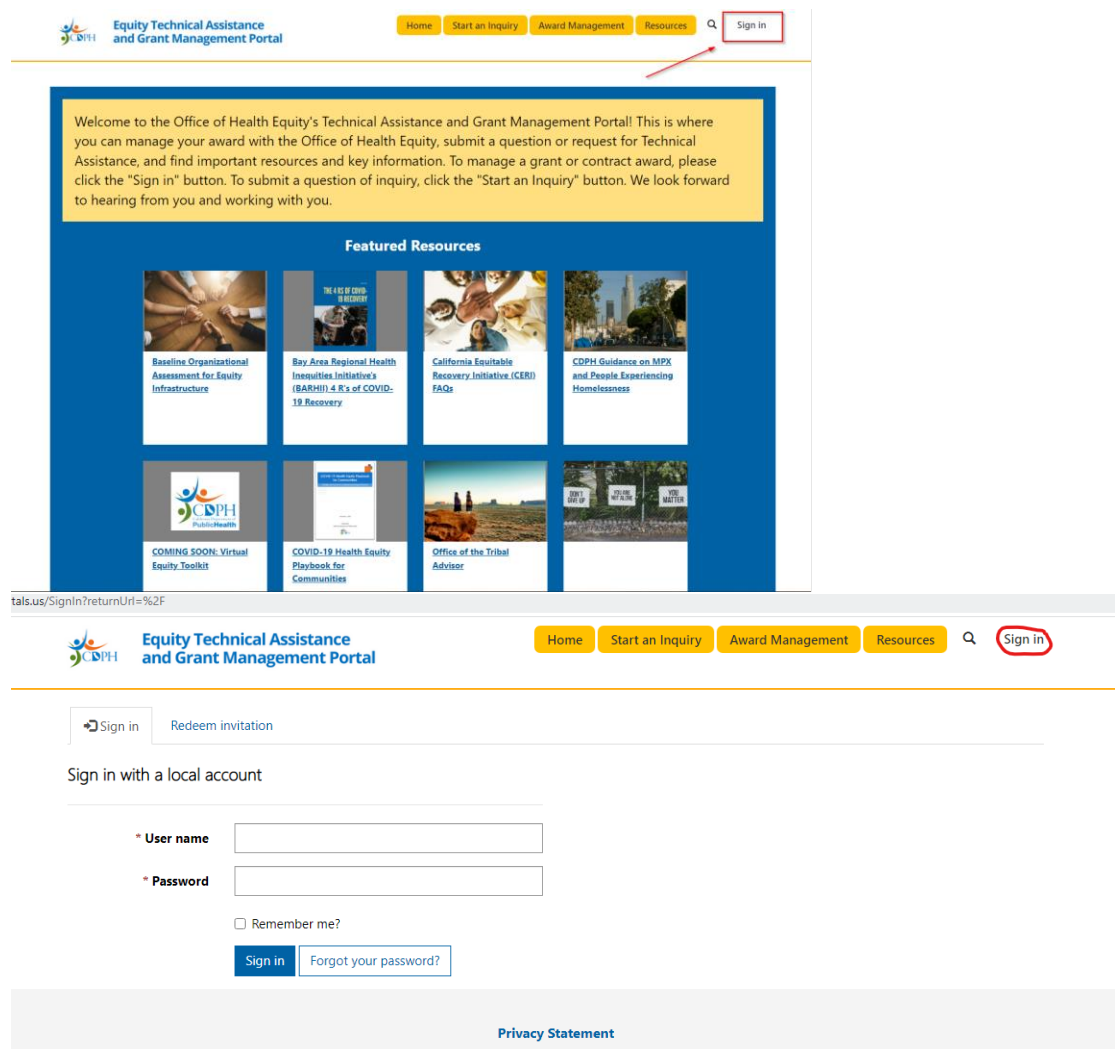
Last Updated: May 15th, 2024

Prepared By: Crowe LLC

Invoice User Guide

Invoice Submission as an Awardee

1. Sign In with your credentials and select your Award
2. Navigate to the [Equity Portal](#) homepage
3. Select **Sign In** from the top right header of the Homepage



The screenshot shows the homepage of the Equity Technical Assistance and Grant Management Portal. The top navigation bar includes links for Home, Start an Inquiry, Award Management, Resources, and Sign In. The Sign In button is highlighted with a red box and a red arrow. Below the navigation bar is a welcome message and a section titled "Featured Resources" with eight resource cards. The URL in the browser address bar is tals.us/SignIn?returnUrl=%2F.

Equity Technical Assistance and Grant Management Portal

Home Start an Inquiry Award Management Resources Sign In

Welcome to the Office of Health Equity's Technical Assistance and Grant Management Portal! This is where you can manage your award with the Office of Health Equity, submit a question or request for Technical Assistance, and find important resources and key information. To manage a grant or contract award, please click the "Sign in" button. To submit a question of inquiry, click the "Start an Inquiry" button. We look forward to hearing from you and working with you.

Featured Resources

- Baseline Organizational Assessment for Equity Infrastructure
- Bay Area Regional Health Inequities Initiative's (BARHI) 4 R's of COVID-19 Recovery
- California Equitable Recovery Initiative (CERI) FAQs
- CDPH Guidance on MPX and People Experiencing Homelessness
- COMING SOON: Virtual Equity Toolkit
- COVID-19 Health Equity Playbook for Communities
- Office of the Tribal Adviser
- YOUR VOICE MATTERS

tals.us/SignIn?returnUrl=%2F

Equity Technical Assistance and Grant Management Portal

Home Start an Inquiry Award Management Resources Sign In

Sign in Redeem invitation

Sign in with a local account

* User name

* Password

Remember me?

Sign in Forgot your password?

[Privacy Statement](#)

4. Enter your username and password, and select **Sign In**

As an Awardee, Create and Submit an Invoice

1. Navigate to the [Equity Portal](#) homepage

2. Select **Sign In** from the top right header of the Homepage
3. Enter in your username and password

4. Select the **Award Management** button in the header
5. Select Award from the dropdown list

6. Select **New Invoice**

Invoices

[New Invoice](#)
[Request Invoice Technical Assistance](#)


Invoice	Start Date ↓	End Date	Total Invoice Amount	Submitter	Submitted On	Status
Sacramento Kings Invoice 2022-12-22 - 2023-01-26	12/22/2022	1/26/2023	\$65,700.00	Keegan Murray	1/26/2023 11:16 AM	Submitted


7. Fill out all fields on the Invoice Page
 - a. Select the start date of the Invoice, which should be the first date when you started incurring expenses
 - b. Select the end date, the last day in which expenses included on the invoice were incurred
 - c. For each budget category, enter the total that you are invoicing for. Do not include dollar signs

TA Regional Invoice Create

Invoice Details

Invoice Period

Invoice Begin Date 

Invoice End Date 

Expenses

Personnel <input type="text"/>	Supplies <input type="text"/>
Travel (In-state) <input type="text"/>	Travel (Out-of-state) <input type="text"/>
Equipment <input type="text"/>	Other <input type="text"/>
Subcontracts <input type="text"/>	Indirect Cost <input type="text"/>
Advance Payment (If Applicable) <input type="text"/>	

Comments

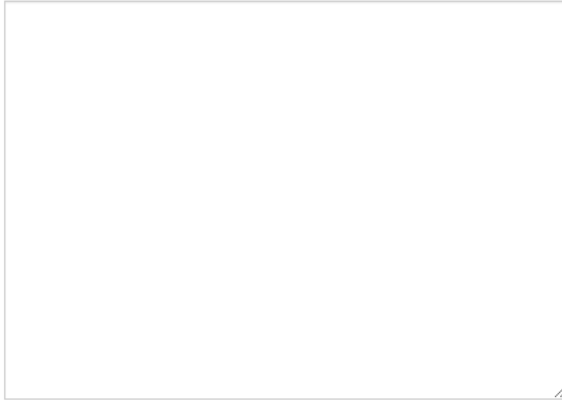
An invoice file is required. Please attach an invoice on your organization's letterhead, that meets all the invoice requirements, and submit here. *

No file chosen

- d. Enter any comments that you think your Grant or Contract manager needs to know regarding your invoice
- e. Select **Choose File** to attach a hard copy of your Invoice as well. Please make sure your hard Invoice includes:
 - i. The logo or header of your organization
 - ii. Your contract number
 - iii. An invoice number
 - iv. The correct dates that match the ones entered above
 - v. The Invoice is addressed to CDPH
 - vi. The Invoice is signed by your organization

8. Select **Submit**

Comments



Feedback

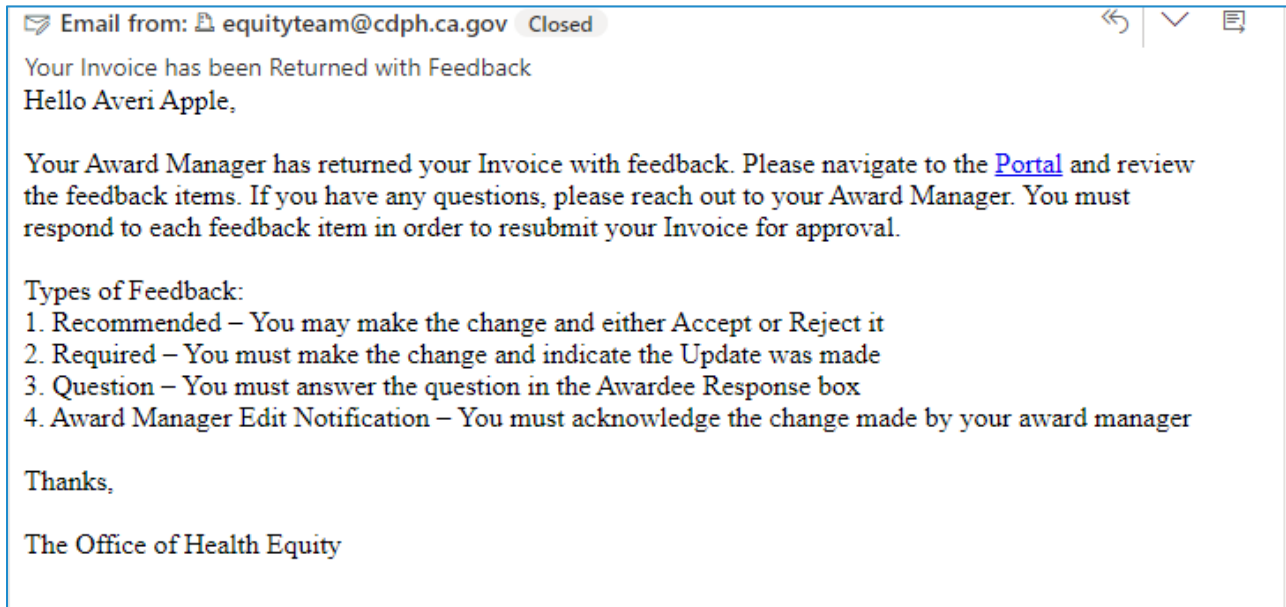
Upload your invoice in the excel template provided. *

No file chosen

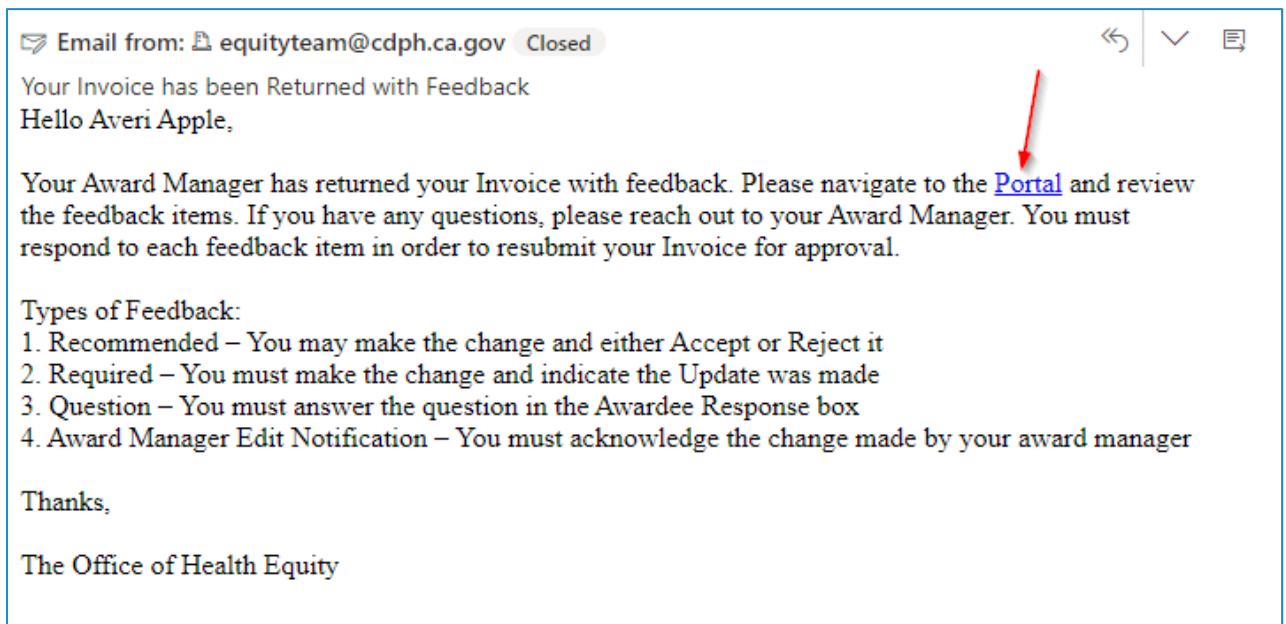
Respond to Award Manager Feedback and Resubmit Your Invoice:

If there is an issue, mistake, or other omission in your invoice, your Contract Manager will return it to you through the Equity Portal. Follow the below instructions to respond to the feedback, make corrections, and resubmit your invoice.

1. Receive an email notifying you that your Invoice has been returned with feedback



2. Follow the hyperlink back to the Equity Portal to review the Invoice



3. Navigate to your Invoice in the Invoice section of the Award Dashboard



Home > Award Management > Tribal CHR COVID19 Dashboard

Tribal CHR COVID19 Dashboard

Inquiries

Inquiry Number	Description	Artifact Type	Date Requested ↓	Status	
INQ-01189	I am waiting on a receipt for one of my budget items, can I come back to the Expenditure Report later?	Expenditure Report	1/26/2023 2:12 PM	Submitted	▼
INQ-01186	I have a question	Work Plan	1/26/2023 9:40 AM	Submitted	▼

Invoices

New Invoice

Request Invoice Technical Assistance

Invoice	Start Date ↓	End Date	Total Invoice Amount	Submitter	Submitted On	Status	
Averi's Apple Orchard Invoice 2023-01-30 - 2023-02-17	1/30/2023	2/17/2023	\$13,700.00	Averi Apple	2/28/2023 10:33 AM	Returned	▼
Averi's Apple Orchard Invoice 2023-01-30 - 2023-02-17	1/30/2023	2/17/2023	\$10,000.00	Averi Apple	2/28/2023 10:47 AM	Returned	▼
Averi's Apple Orchard Invoice 2023-01-01 - 2023-02-09	1/1/2023	2/9/2023	\$14,700.00	Averi Apple	2/28/2023 10:35 AM	Returned	▼

4. Scroll down to the Feedback table

Subcontracts
\$ 1,000.00

Indirect Cost
\$ 1,000.00

Advance Payment (If Applicable)
\$ 0.00

Comments
All good so far

Feedback

To respond to Feedback, first read the Feedback from your Award Manager. Then, scroll up to the item your Award Manager commented on. Update, review, or acknowledge your item as per instructions, then return to the Feedback table. Respond to the feedback as applicable in the Awardee Response field, then choose an updated Feedback Status to reflect your actions. Finally, Submit your invoice again to your Award Manager. You must update the Feedback Status for each piece of Feedback in order to be able to re-submit.

Last Updated	Feedback Type	Feedback	Awardee Feedback Status	Awardee Response
2/28/2023 10:35 AM	Question	What are the Other costs for?	Answered	Costs <input type="button" value="v"/>
3/1/2023 3:58 PM	Question	How many personnel were hired?		<input type="button" value="v"/>

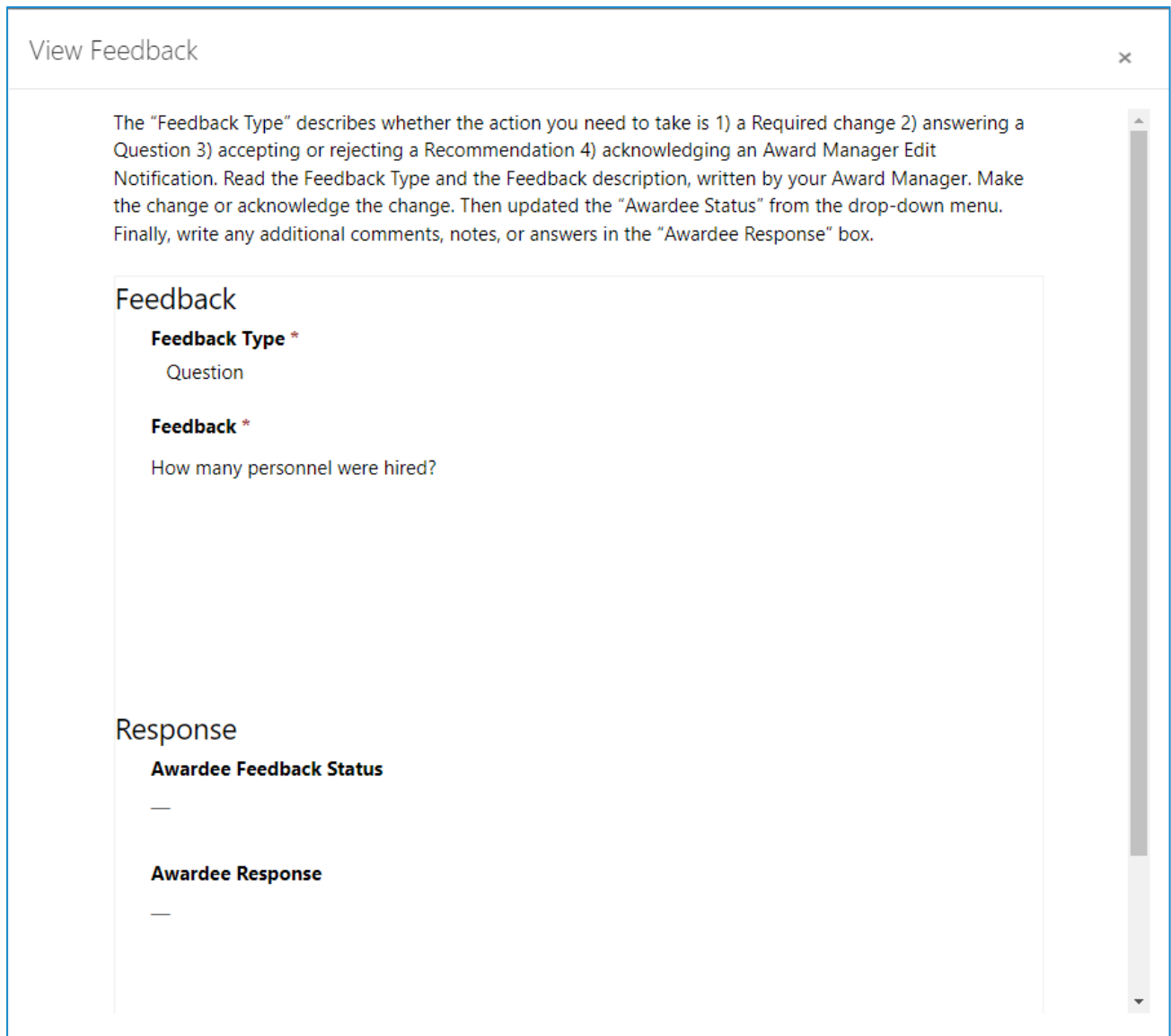
5. Review the Award Manager's feedback

Feedback

To respond to Feedback, first read the Feedback from your Award Manager. Then, scroll up to the item your Award Manager commented on. Update, review, or acknowledge your item as per instructions, then return to the Feedback table. Respond to the feedback as applicable in the Awardee Response field, then choose an updated Feedback Status to reflect your actions. Finally, Submit your invoice again to your Award Manager. You must update the Feedback Status for each piece of Feedback in order to be able to re-submit.

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3/1/2023 3:58 PM	Question	How many personnel were hired?		<input type="button" value="v"/>

Respond to Feedback
View Feedback



- a. Feedback Type- This tells you whether your Award Manager has a question, recommendation, required change, or has made an edit to your Invoice.
 - b. Feedback- This is the exact feedback your Award Manager has written for you. Read this to understand why your Invoice was returned and what needs to be done.
6. Once you have read the feedback, make the edits to your Invoice first.
 7. After you have made the edits, respond to the Award Manager's feedback under "Response", as seen in the screenshot below.

Feedback

To respond to Feedback, first read the Feedback from your Award Manager. Then, scroll up to the item your Award Manager commented on. Update, review, or acknowledge your item as per instructions, then return to the Feedback table. Respond to the feedback as applicable in the Awardee Response field, then choose an updated Feedback Status to reflect your actions. Finally, Submit your invoice again to your Award Manager. You must update the Feedback Status for each piece of Feedback in order to be able to re-submit.

Last Updated	Feedback Type	Feedback	Awardee Feedback Status	Awardee Response
2/28/2023 10:35 AM	Question	What are the Other costs for?	Answered	Costs
3/1/2023 3:58 PM	Question	How many personnel were hired?		

Respond to Feedback
View Feedback

Edit

The "Feedback Type" describes whether the action you need to take is 1) a Required change 2) answering a Question 3) accepting or rejecting a Recommendation 4) acknowledging an Award Manager Edit Notification. Read the Feedback Type and the Feedback description, written by your Award Manager. Make the change or acknowledge the change. Then updated the "Awardee Status" from the drop-down menu. Finally, write any additional comments, notes, or answers in the "Awardee Response" box.

Feedback

Feedback Type *

Question

Feedback *

How many personnel were hired?

Response

Awardee Feedback Status *

Awardee Response *

8. Select Awardee Response Status
 - a. Select the drop-down menu that best categorizes the updates you made in response to your Award Managers feedback.

Edit ×

The "Feedback Type" describes whether the action you need to take is 1) a Required change 2) answering a Question 3) accepting or rejecting a Recommendation 4) acknowledging an Award Manager Edit Notification. Read the Feedback Type and the Feedback description, written by your Award Manager. Make the change or acknowledge the change. Then updated the "Awardee Status" from the drop-down menu. Finally, write any additional comments, notes, or answers in the "Awardee Response" box.

Feedback

Feedback Type *
Question

Feedback *
How many personnel were hired?

Response

Awardee Feedback Status *

Answered

- i. If Feedback Type is **Recommended**, Awardee Feedback Status options are:
 1. Accepted
 2. Rejected
 - ii. If Feedback Type is **Required**, Awardee Feedback Status options are:
 1. Updated
 - iii. If Feedback Type is **Award Manager Edit Notification**, Awardee Feedback Status options are:
 1. Acknowledged
 - iv. If Feedback Type is **Question**, Awardee Feedback Status options are:
 1. Answered
- b. Respond to Feedback in Awardee Response field

- i. Write out your response to your Award Manager, including any other details or information that they might need

The screenshot shows a web interface for editing a response. At the top left is an 'Edit' button with a pencil icon, and at the top right is a close button 'x'. The form is divided into two main sections: 'Question' and 'Response'. Under 'Question', there is a label 'Feedback *' and the text 'How many personnel were hired?'. Under 'Response', there is a label 'Awardee Feedback Status *' with a dropdown menu currently showing 'Answered'. Below that is a label 'Awardee Response *' with a text area containing the text '1 person was [hired](#)'. At the bottom left of the form is a yellow 'Submit Response' button. A vertical scrollbar is visible on the right side of the form.

9. Submit Response

- a. You will only be able to submit your Invoice if you have updated the “Awardee Feedback Status” and “Awardee Response” fields for every piece of feedback that your Award Manager created.

10. Re-Submit Invoice

Feedback

To respond to Feedback, first read the Feedback from your Award Manager. Then, scroll up to the item your Award Manager commented on. Update, review, or acknowledge your item as per instructions, then return to the Feedback table. Respond to the feedback as applicable in the Awardee Response field, then choose an updated Feedback Status to reflect your actions. Finally, Submit your invoice again to your Award Manager. You must update the Feedback Status for each piece of Feedback in order to be able to re-submit.

Last Updated	Feedback Type	Feedback	Awardee Feedback Status	Awardee Response	
2/28/2023 10:35 AM	Question	What are the Other costs for?	Answered	Costs	▼
3/1/2023 4:06 PM	Question	How many personnel were hired?	Answered	1 person was hired	▼

Upload your invoice in the excel template provided.

No file chosen

11. You will receive a confirmation email that your Invoice has been submitted
 - a. If it is approved, you will get an email notification when your Award Manager approves it
 - b. If your Award Manager has additional feedback, they will return it again and the new feedback will appear underneath the original feedback. You will be able to identify different rounds of feedback by the "Last Updated" date next to the feedback