



# Energy Commission Agreement Management System (ECAMS)

Submitting an Invoice



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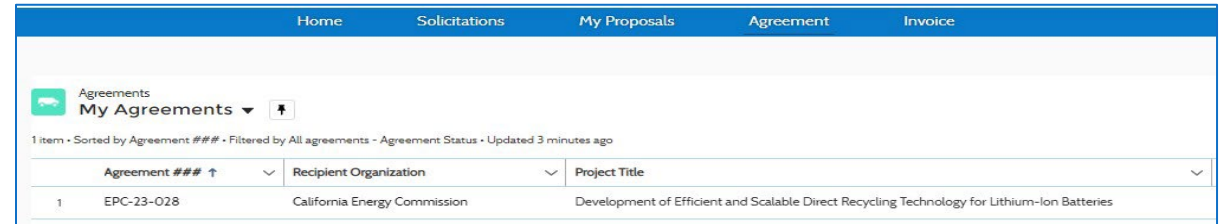
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# Selecting The Agreement To Invoice

1. Log in to ECAMS and click on the Agreements tab.
2. Click on the agreement number you wish to invoice.
3. Click on the Create Invoice button to start your invoice.





# Creating The Draft Invoice

1. Enter information into the mandatory fields to proceed
2. Click the save button to save and proceed

New Invoice

Agreement : EPC-24-125      Retention Method : Retention is NOT required to be withheld for this agreement  
Agreement Start Date : March 12, 2024      Agreement End Date : March 31, 2026

\* Invoice Date

\* Invoice Start Date

\* Invoice End Date

\* Types of Invoice

Company Tracking #

Retention Amount ⓘ

\* Advance Payment

Funds Spent for CA

Funds Spent for CBE

Funds Spent for DVBE (Prime Recipient) ⓘ

Other Explanation



# Draft Invoice Preview

**1. Download Cover Sheet** – Click Download Cover Sheet to generate and download a cover sheet for this invoice.

**2. Invoice Attachments**- Click this button to attach additional invoice documentation.

**3. Update Primary Contact Information**- Click this button to view or edit primary contact information.

**4. Update Remittance Address**- Click this button to view or edit the remittance address.

**5. Add Category/Line Item Expenses**- Click this button to view or edit invoice category or line item expense totals.

**6. Edit Invoice**- Click this button to view or edit invoice details.

**7. Submit for Approval**- Click this button to start the invoice submission process.

**8. Cancel Invoice** – Click this button to cancel the draft invoice.

Home
Solicitations
My Proposals
Agreements
Invoices

Invoice Attachments
Update Primary Contact Information
Add Category/Line Item Expenses
Submit for Approval

Update Remittance Address
Edit Invoice
Cancel Invoice

Details
Files
Cover Sheet
Category/Line Item Expenses

|  |   |  |   |
|--|---|--|---|
| Invoice #                              | ARV-24-108-010  | Invoice Cover Sheet Link               | <a href="#">Download Cover Sheet</a>                        |
| Agreement                              | ARV-24-108  | Description                            |   |
| Status                                 | Draft   | Organization Name                      | California Energy Commission                                |
| Approval Comments                      |   | Advance Payment                        | No  |
| Types of Invoice                       | Regular   | Advance Payment Amount                 |   |
| Invoice Date                           | 4/2/2024  | Project Manager Name                   | Yang  |
| Invoice Start Date                     | 4/5/2024  | Project Manager Email Address          | yang.xiong-phase2@energy.ca.gov                             |
| Invoice End Date                       | 4/9/2024  | Project Manager Phone                  | 9167763087  |
| Total To Be Paid This Invoice          | \$0.00  | Project Manager Fax                    |   |
| Organization Tracking Number           |   | Remittance Address                     | California<br>Sacramento, California 95814<br>United States |
| Retention Method                       | Retention will be withheld at the end of the agreement (minus exempt subrecipients) | Retention Amount                       |   |
| PO#                                    |   | Funds Spent for CA                     | \$200.00  |
| Funds Spent for CBE                    |   | Funds Spent for DVBE (Prime Recipient) | \$150.00  |
| Total Funds Spent for DVBE (Prime+Sub) | \$150.00  |  |   |

| CEC Reimbursable Summary         |                               |                                   |                                    |                                 |                      |
|----------------------------------|-------------------------------|-----------------------------------|------------------------------------|---------------------------------|----------------------|
| Category                         | Agreement Reimbursable Budget | Reimbursable Expenses This Period | Cumulative Expenses Billed to Date | % of Reimbursable Spent to Date | Reimbursable Balance |
| Direct Labor                     | \$0.00                        | \$0.00                            | \$0.00                             | 0.00%                           | \$0.00               |
| Fringe Benefits                  | \$5,000.00                    | \$0.00                            | \$3,457.00                         | 69.14%                          | \$1,543.00           |
| Travel                           | \$5,000.00                    | \$0.00                            | \$2,500.00                         | 50.00%                          | \$2,500.00           |
| Equipment                        | \$10,000.00                   | \$0.00                            | \$2,000.00                         | 20.00%                          | \$8,000.00           |
| Materials/Misc.                  | \$10,000.00                   | \$0.00                            | \$7,500.00                         | 75.00%                          | \$2,500.00           |
| Subs/Vendors                     | \$20,000.00                   | \$0.00                            | \$20,000.00                        | 100.00%                         | \$0.00               |
| Indirect Costs                   | \$0.00                        | \$0.00                            | \$0.00                             | 0.00%                           | \$0.00               |
| Profit                           | \$0.00                        | \$0.00                            | \$0.00                             | 0.00%                           | \$0.00               |
| <b>Total</b>                     | <b>\$50,000.00</b>            | <b>\$0.00</b>                     | <b>\$35,457.00</b>                 | <b>70.91%</b>                   | <b>\$14,543.00</b>   |
| Reimbursement Total This Period: |                               | \$0.00                            | Retention Release Invoice:         |                                 | No                   |
| Retention Amount:                |                               |                                   |                                    |                                 |                      |

| Match Share Summary |                              |                                  |                                      |                          |               |
|---------------------|------------------------------|----------------------------------|--------------------------------------|--------------------------|---------------|
| Category            | Agreement Match Share Budget | Match Share Expenses This Period | Cumulative Match Share Spent to Date | % of Match Spent to Date | Match Balance |
| Direct Labor        | \$0.00                       | \$0.00                           | \$0.00                               | 0.00%                    | \$0.00        |
| Fringe Benefits     | \$20,000.00                  | \$0.00                           | \$761.32                             | 3.81%                    | \$19,238.68   |
| Travel              | \$10,000.00                  | \$0.00                           | \$0.00                               | 0.00%                    | \$10,000.00   |
| Equipment           | \$10,000.00                  | \$0.00                           | \$1,547.00                           | 15.47%                   | \$8,453.00    |
| Materials/Misc.     | \$10,000.00                  | \$0.00                           | \$11,000.00                          | 110.00%                  | (\$1,000.00)  |
| Subs/Vendors        | \$20,000.00                  | \$0.00                           | \$93,221.00                          | 466.11%                  | (\$73,221.00) |
| Indirect Costs      | \$0.00                       | \$0.00                           | \$0.00                               | 0.00%                    | \$0.00        |



# Draft Invoice Preview (cont..)

Invoice Attachments
Update Primary Contact Information
Add Category/Line Item Expenses
Submit for Approval

Update Remittance Address
Edit Invoice
Cancel Invoice

Details Files Cover Sheet **Category/Line Item Expenses**

**Direct Labor (0)**

| CEC SHARE        | MATCH SHARE |
|------------------|-------------|
| No data returned |             |

**Fringe Benefits (0)**

| CEC SHARE        | MATCH SHARE |
|------------------|-------------|
| No data returned |             |

**Travel (0)**

| CEC SHARE        | MATCH SHARE |
|------------------|-------------|
| No data returned |             |

**Equipment (0)**

| REFERENCE ID     | TOTAL | LINE DESCRIPTION | NOTES | CEC SHARE | MATCH SHARE |
|------------------|-------|------------------|-------|-----------|-------------|
| No data returned |       |                  |       |           |             |

**Materials/Miscellaneous (0)**

| REFERENCE ID     | TOTAL | LINE DESCRIPTION | NOTES | CEC SHARE | MATCH SHARE |
|------------------|-------|------------------|-------|-----------|-------------|
| No data returned |       |                  |       |           |             |

**Subrecipients (0)**

| REFERENCE ID     | SUBRECIPIENT | TOTAL | PURPOSE | NOTES | CEC SHARE | MATCH SHARE | FUNDS SPENT FOR DVBE |
|------------------|--------------|-------|---------|-------|-----------|-------------|----------------------|
| No data returned |              |       |         |       |           |             |                      |

**Vendors (0)**

| REFERENCE ID     | VENDOR | TOTAL | PURPOSE | NOTES | CEC SHARE | MATCH SHARE | FUNDS SPENT FOR DVBE |
|------------------|--------|-------|---------|-------|-----------|-------------|----------------------|
| No data returned |        |       |         |       |           |             |                      |

**Indirect Costs (0)**

| CEC SHARE        | MATCH SHARE |
|------------------|-------------|
| No data returned |             |

**Profit (0)**

| CEC SHARE        | MATCH SHARE |
|------------------|-------------|
| No data returned |             |

| CEC Reimbursable Summary         |                               |                                   |                                    |                                 |                      |
|----------------------------------|-------------------------------|-----------------------------------|------------------------------------|---------------------------------|----------------------|
| Category                         | Agreement Reimbursable Budget | Reimbursable Expenses This Period | Cumulative Expenses Billed to Date | % of Reimbursable Spent to Date | Reimbursable Balance |
| Direct Labor                     | \$0.00                        | \$0.00                            | \$0.00                             | 0.00%                           | \$0.00               |
| Fringe Benefits                  | \$5,000.00                    | \$0.00                            | \$3,457.00                         | 69.14%                          | \$1,543.00           |
| Travel                           | \$5,000.00                    | \$0.00                            | \$2,500.00                         | 50.00%                          | \$2,500.00           |
| Equipment                        | \$10,000.00                   | \$0.00                            | \$2,000.00                         | 20.00%                          | \$8,000.00           |
| Materials/Misc                   | \$10,000.00                   | \$0.00                            | \$7,500.00                         | 75.00%                          | \$2,500.00           |
| Subs/Vendors                     | \$20,000.00                   | \$0.00                            | \$20,000.00                        | 100.00%                         | \$0.00               |
| Indirect Costs                   | \$0.00                        | \$0.00                            | \$0.00                             | 0.00%                           | \$0.00               |
| Profit                           | \$0.00                        | \$0.00                            | \$0.00                             | 0.00%                           | \$0.00               |
| <b>Total</b>                     | <b>\$50,000.00</b>            | <b>\$0.00</b>                     | <b>\$35,457.00</b>                 | <b>70.91%</b>                   | <b>\$14,543.00</b>   |
| Reimbursement Total This Period: |                               | \$0.00                            | Retention Release Invoice:         |                                 | No                   |
| Retention Amount:                |                               |                                   |                                    |                                 |                      |

| Match Share Summary       |                              |                                  |                                      |                          |                      |
|---------------------------|------------------------------|----------------------------------|--------------------------------------|--------------------------|----------------------|
| Category                  | Agreement Match Share Budget | Match Share Expenses This Period | Cumulative Match Share Spent to Date | % of Match Spent to Date | Match Balance        |
| Direct Labor              | \$0.00                       | \$0.00                           | \$0.00                               | 0.00%                    | \$0.00               |
| Fringe Benefits           | \$20,000.00                  | \$0.00                           | \$761.32                             | 3.81%                    | \$19,238.68          |
| Travel                    | \$10,000.00                  | \$0.00                           | \$0.00                               | 0.00%                    | \$10,000.00          |
| Equipment                 | \$10,000.00                  | \$0.00                           | \$1,547.00                           | 15.47%                   | \$8,453.00           |
| Materials/Misc            | \$10,000.00                  | \$0.00                           | \$11,000.00                          | 110.00%                  | (\$1,000.00)         |
| Subs/Vendors              | \$20,000.00                  | \$0.00                           | \$93,221.00                          | 466.11%                  | (\$73,221.00)        |
| Indirect Costs            | \$0.00                       | \$0.00                           | \$0.00                               | 0.00%                    | \$0.00               |
| Profit                    | \$0.00                       | \$0.00                           | \$0.00                               | 0.00%                    | \$0.00               |
| <b>Total</b>              | <b>\$70,000.00</b>           | <b>\$0.00</b>                    | <b>\$106,529.32</b>                  | <b>152.18%</b>           | <b>(\$36,529.32)</b> |
| <b>Grand Totals</b>       | <b>\$120,000.00</b>          | <b>\$0.00</b>                    | <b>\$141,986.32</b>                  | <b>118.32%</b>           | <b>(\$21,986.32)</b> |
| Match Amount This Period: |                              | \$0.00                           | Manual Entry Retention Amount:       |                          |                      |



# Draft Invoice Preview (cont..)

## Invoice Line Items

Budget Category

Direct Labor

Direct Labor (0)

Filter Refresh New

| CEC SHARE        | MATCH SHARE | TOTAL |
|------------------|-------------|-------|
| No data returned |             |       |

Close

## Invoice Line Items

- None--
- ✓ Direct Labor
- Fringe Benefits
- Travel
- Equipment
- Material/Miscellaneous
- Subrecipients / Vendors
- Indirect Costs
- Profit

Close



# Invoice Submission

1. After clicking on the **Submit for Approval** button on the Draft Invoice Preview screen, the system will validate the invoice.
2. Confirmation pop-up appears after submitting invoice for approval.
3. Click the **Ok** button to proceed further.

**NOTE: The system is only validating that the user included data in the invoice, it is not validating that the invoice meets CEC requirements.**

The screenshot shows the California Energy Commission web portal. A pop-up message with a green checkmark icon reads "Invoice Validation Successful!". Below the message, it says "Invoice Validation Successful!". At the bottom right of the pop-up are "Cancel" and "OK" buttons. In the background, the "Draft Invoice Preview" screen is visible, showing a navigation menu with "Home", "Solicitations", "My Proposals", "Agreement", and "Invoice". There are two buttons: "Update Primary Contact Information" and "Edit Invoice Expense". Below the pop-up, a table displays invoice details:

|                    |                            |                  |            |
|--------------------|----------------------------|------------------|------------|
| Invoice Date       | 12/16/2022                 | Types of Invoice | Regular    |
| Invoice Start Date | 12/16/2022                 | Invoice End Date | 12/20/2022 |
| Organization       |                            | Description      |            |
| Tracking Number    |                            |                  |            |
| Retention          | Retention will be withheld | Total To Be      | \$400.00   |

Below the table is a summary table:

|                |            |          |        |       |            |
|----------------|------------|----------|--------|-------|------------|
| Direct Labor   | \$1,000.00 | \$100.00 | \$0.00 | 0.00% | \$1,000.00 |
| Fringe Bene... | \$500.00   | \$200.00 | \$0.00 | 0.00% | \$500.00   |
| Travel         | \$500.00   | \$0.00   | \$0.00 | 0.00% | \$500.00   |
| Equipment      | \$500.00   | \$0.00   | \$0.00 | 0.00% | \$500.00   |
| Materials/M... | \$500.00   | \$0.00   | \$0.00 | 0.00% | \$500.00   |
| Subs/Vend...   | \$2,000.00 | \$0.00   | \$0.00 | 0.00% | \$2,000.00 |
| Indirect Costs | \$0.00     | \$0.00   | \$0.00 | 0.00% | \$0.00     |





# Invoice Submission (cont..)

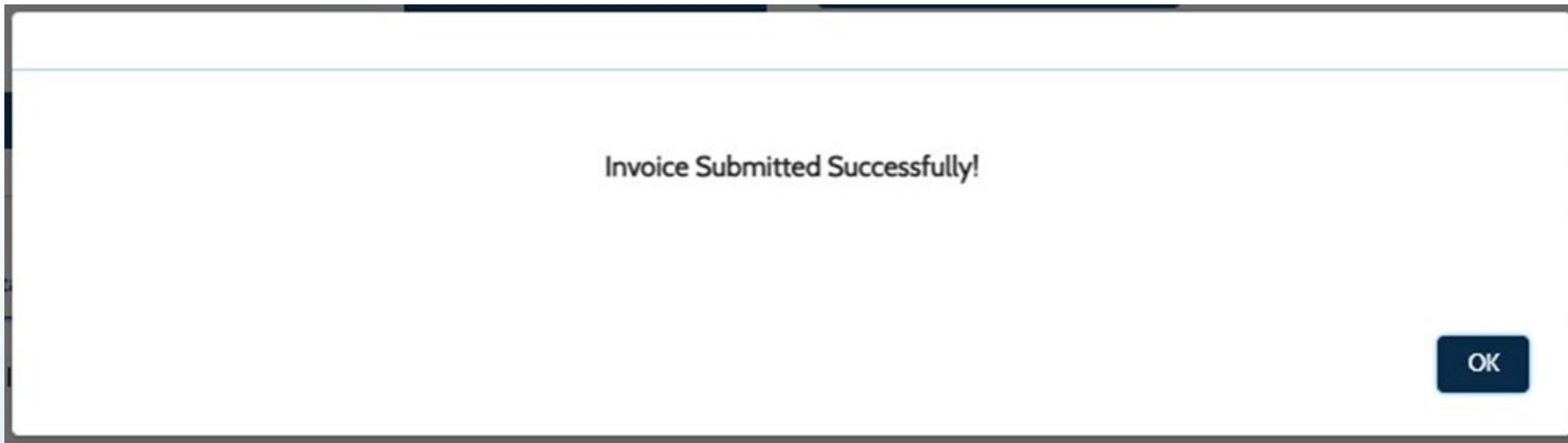
1. Review the certification notice. The **I Agree to the Certification** box must be checked before clicking on the **Continue** button to proceed further.
2. Upload your required signed invoice cover sheet and standard invoice template using the **Upload Files** buttons. (Please note that you can upload the training invoice or other currently used invoice format in this location.)
3. Click on the **Continue** button to submit the invoice to the CEC.

The screenshot shows a web interface for the California Energy Commission. A modal window titled "Certification" is open, containing the following text: "I certify under penalty of perjury that this invoice is accurate and conforms to the requirements of this agreement. Reimbursement for these costs has not and will not be received from any other sources. I have carefully reviewed the terms and conditions for this agreement and have determined that, for work covered by this invoice, the recipient and all subrecipients have complied with all agreement terms, including the requirement of compliance with public works and prevailing wage laws, which when applicable require, among other things, the payment of prevailing wages to eligible workers. All invoice backup documentation (e.g. receipts, invoices, etc.) is available upon request for any items at any time. All invoiced amounts, including indirect cost rates, are for actual and allowable expenditures under this agreement." Below the text is a checkbox labeled "I Agree to the Certification" which is currently unchecked. There are two sections for file uploads: "Signed Invoice Coversheet" and "Standard Invoice Template", each with an "Upload Files" button and an "Or drop files" option. At the bottom right of the modal are "Back" and "Continue" buttons. The background shows a table with columns for "Materials/M...", "Subs/Vend...", and "Indirect Costs", with values like \$500.00, \$2,000.00, and \$0.00. A "Total To Be" of \$400.00 is also visible.



# Invoice Submission (cont..)

1. A box will appear if your invoice has been successfully submitted to the CEC. Your Commission Agreement Manager will receive a notice to review your invoice.
2. Click on the **OK** button to proceed.





# Submitted Invoice Summary

1. After successful submission, a summary page of the invoice will be displayed.
2. If you need to modify your invoice after submission, please contact your CAM directly.

CALIFORNIA ENERGY COMMISSION

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Details
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Cover Sheet
Budget Line Items

|  |   |  |  |
|--|---|--|--|
| Invoice #                              | EPC-24-125-001  | Invoice Cover Sheet Link               | <a href="#">Download Cover Sheet</a>                         |
| Agreement                              | EPC-24-125  | Description                            |  |
| Status                                 | Submitted   | Organization Name                      | AnkitaP_DVBE   |
| Approval Comments                      |   | Project Manager Name                   |  |
| Types of Invoice                       | Regular   | Project Manager Email Address          |  |
| Invoice Date                           | 3/12/2024   | Project Manager Phone                  | 6692934796   |
| Invoice Start Date                     | 3/15/2024   | Project Manager Fax                    |  |
| Invoice End Date                       | 3/31/2024   | Remittance Address                     | California<br>Santa Maria, California 89098<br>United States |
| Total To Be Paid This Invoice          | \$40.00   | Organization Tracking Number           |  |
| Retention Method                       | Retention is NOT required to be withheld for this agreement | Retention Amount                       | (\$10.00)  |
| PO#                                    | 890   | Funds Spent for CA                     | \$10.00  |
| Funds Spent for CBE                    | \$10.00   | Funds Spent for DVBE (Prime Recipient) | \$10.00  |
| Total Funds Spent for DVBE (Prime+Sub) | \$50.00   |  |  |

| CEC Reimbursable Summary         |                               |                                   |                                    |                                 |                      |
|----------------------------------|-------------------------------|-----------------------------------|------------------------------------|---------------------------------|----------------------|
| Category                         | Agreement Reimbursable Budget | Reimbursable Expenses This Period | Cumulative Expenses Billed to Date | % of Reimbursable Spent to Date | Reimbursable Balance |
| Direct Labor                     | \$40.00                       | \$10.00                           | \$10.00                            | 25.00%                          | \$30.00              |
| Fringe Benefits                  | \$90.00                       | \$10.00                           | \$10.00                            | 11.11%                          | \$80.00              |
| Travel                           | \$70.00                       | \$0.00                            | \$0.00                             | 0.00%                           | \$70.00              |
| Equipment                        | \$200.00                      | \$10.00                           | \$10.00                            | 5.00%                           | \$190.00             |
| Materials/Misc.                  | \$2,000.00                    | \$10.00                           | \$10.00                            | 0.50%                           | \$1,990.00           |
| Subs/Vendors                     | \$13,900.00                   | \$10.00                           | \$10.00                            | 0.07%                           | \$13,890.00          |
| Indirect Costs                   | \$80.00                       | \$0.00                            | \$0.00                             | 0.00%                           | \$80.00              |
| Profit                           | \$800.00                      | \$0.00                            | \$0.00                             | 0.00%                           | \$800.00             |
| <b>Total</b>                     | <b>\$17,180.00</b>            | <b>\$50.00</b>                    | <b>\$50.00</b>                     | <b>0.29%</b>                    | <b>\$17,130.00</b>   |
| Reimbursement Total This Period: |                               | \$50.00                           | Retention Release Invoice:         |                                 | No                   |
| Retention Amount:                |                               | (\$10.00)                         |                                    |                                 |                      |

| Match Share Summary |                              |                                  |                                      |                          |               |
|---------------------|------------------------------|----------------------------------|--------------------------------------|--------------------------|---------------|
| Category            | Agreement Match Share Budget | Match Share Expenses This Period | Cumulative Match Share Spent to Date | % of Match Spent to Date | Match Balance |
| Direct Labor        | \$100.00                     | \$10.00                          | \$10.00                              | 10.00%                   | \$90.00       |
| Fringe Benefits     | \$300.00                     | \$10.00                          | \$10.00                              | 3.33%                    | \$290.00      |
| Travel              | \$1,000.00                   | \$0.00                           | \$0.00                               | 0.00%                    | \$1,000.00    |
| Equipment           | \$1,990.00                   | \$10.00                          | \$10.00                              | 0.50%                    | \$1,980.00    |

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# Invoice Status

- To check the status of your invoice review and payment information, click the Invoice tab on your ECAMS home page.

| Home   | Solicitations     | My Proposals                 | Agreement                     | Invoice               |                     |              |              |
|--|-------------------|------------------------------|-------------------------------|-----------------------|---------------------|--------------|--------------|
| Invoices   |                   |                              |                               |                       |                     |              |              |
| All Invoices ▾ ↑   |                   |                              |                               |                       |                     |              |              |
| 3 items • Sorted by Invoice ## • Filtered by All invoices • Updated 11 minutes ago |                   |                              |                               |                       |                     |              |              |
| <input type="text" value="Search this list.."/>                                    |                   |                              |                               |                       |                     |              |              |
| Invoice ## ↑   | Organization Name | Invoice End Date             | Total To Be Paid This Invoice | Date Submitted to SCO | Date Payment Mailed | Check Number | Status       |
| 1  | EPC-23-028-001    | California Energy Commission | 2/28/2023                     | \$0.00                |                     |              | Cancel       |
| 2  | EPC-23-028-002    | California Energy Commission | 2/24/2023                     | \$1,500.00            |                     |              | Submitted    |
| 3  | EPC-23-028-003    | California Energy Commission | 2/28/2023                     | \$9,000.00            | 3/13/2023           |              | Invoice Paid |



**Thank You!**

