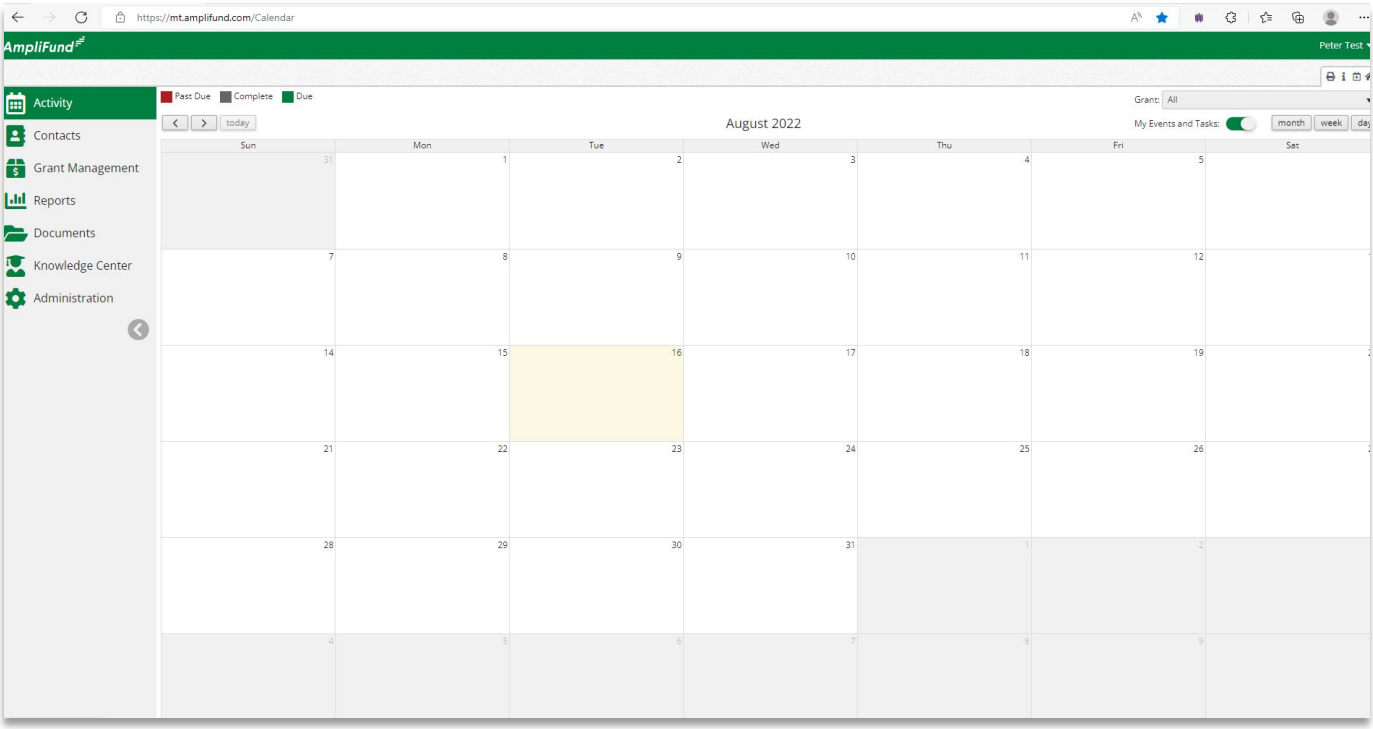
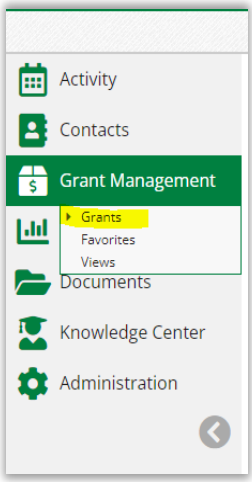
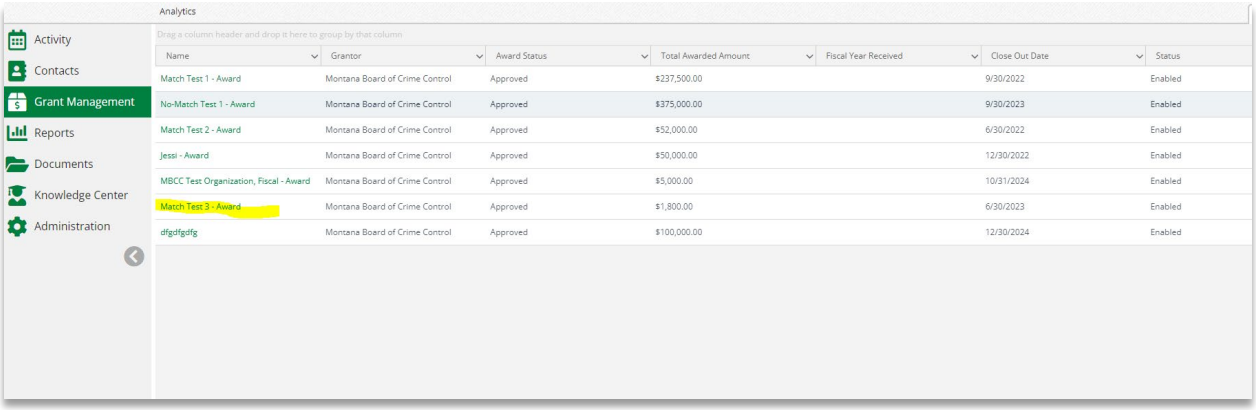
AmpliFund
Creating Expense Entries, Reporting Periods, & Payment Requests



1. Log in to AmpliFund and click Grant Management from the navigation bar located on the left-hand side of the screen.
2. From the Grant Management drop-down menu, select Grants.



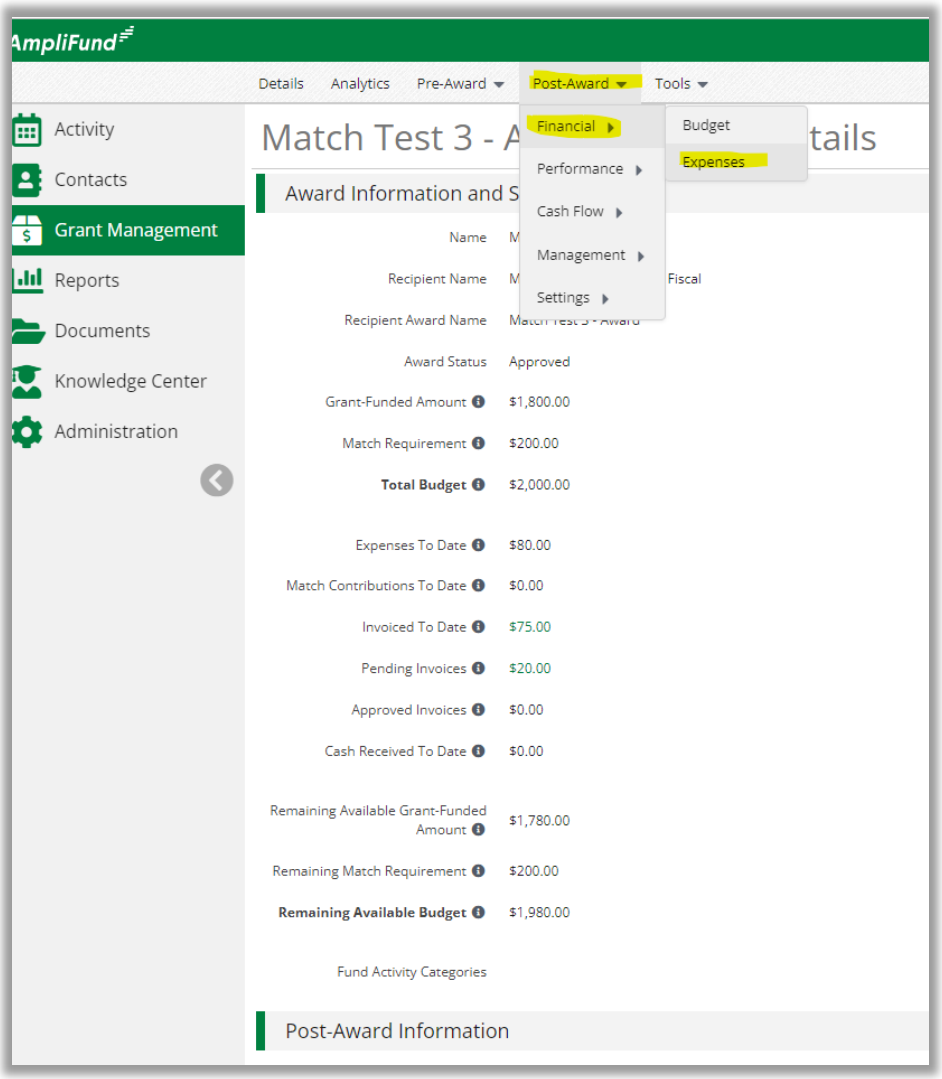
3. A list of all the grants that awarded to your entity will appear. Click on the grant you want.



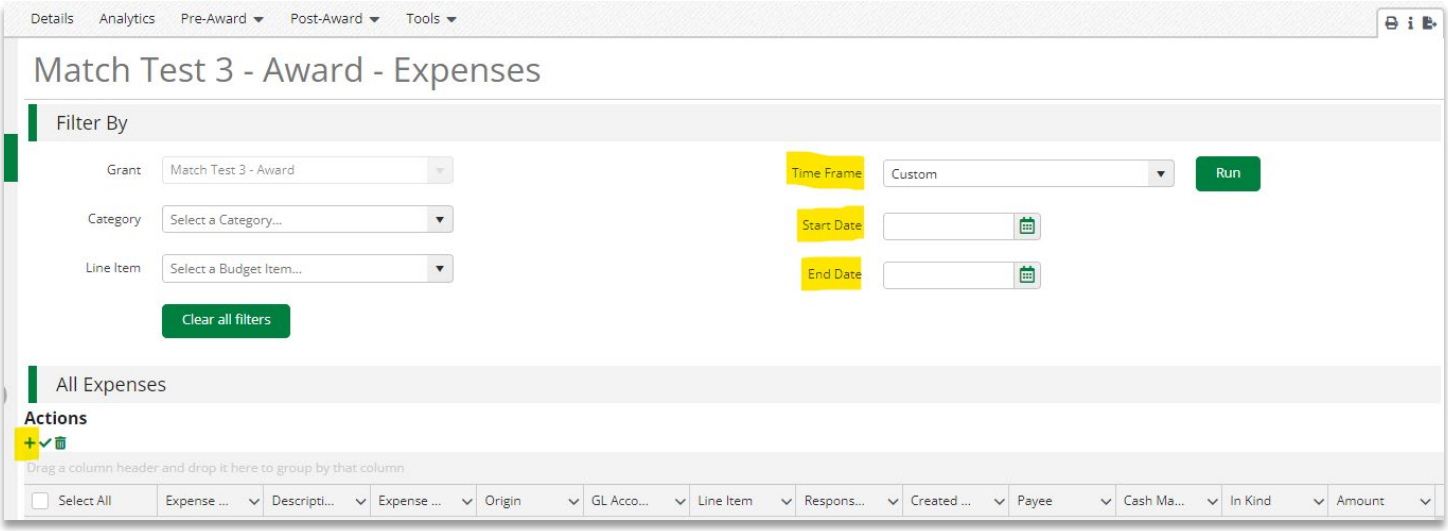
After clicking on the grant you want, the Details page will pull up.

Entering Expenses

1. From the Details page click on Post-Award located in ribbon at the top. Hover over Financial then click Expenses.

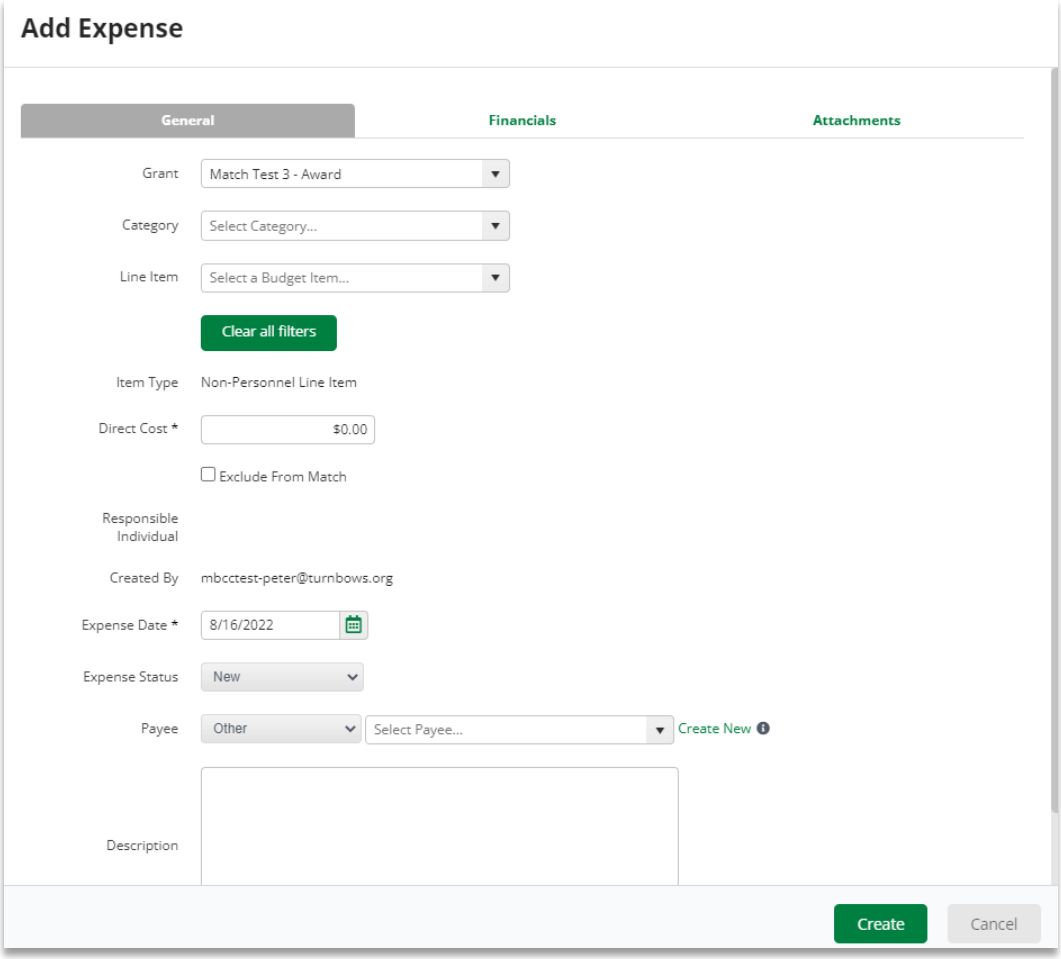


2. Enter the time frame (this will either be monthly or quarterly) then click Run. Click on the + to enter expenses.



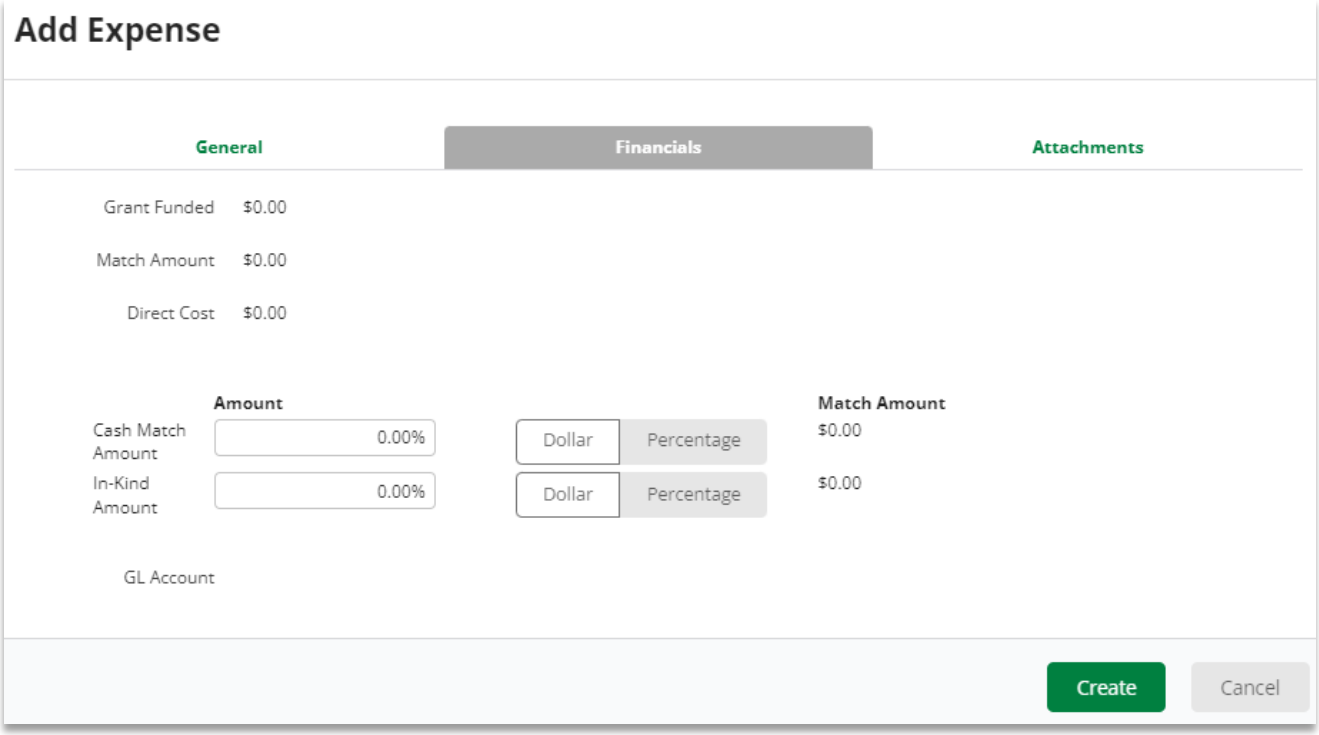
3. From the Add Expense you will enter all the required information on EACH of the Tabs (General, Financials, Attachments)

General Tab



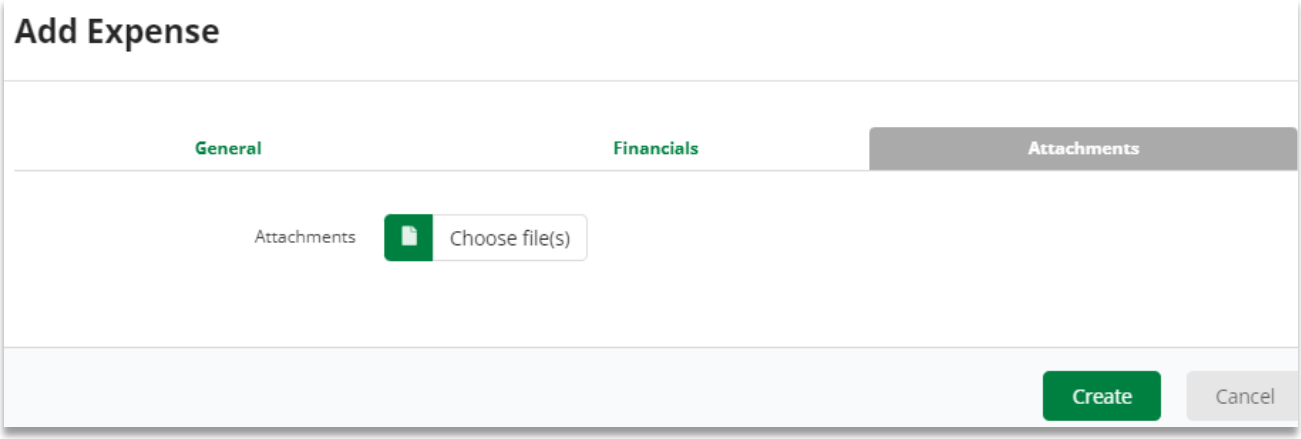
ENTER INFORMATION IN THE FOLLOWING FIELDS - Category, Line Item, Direct Cost, Expense Date (this will default to the current date), Payee, and description (if needed)

Financials Tab



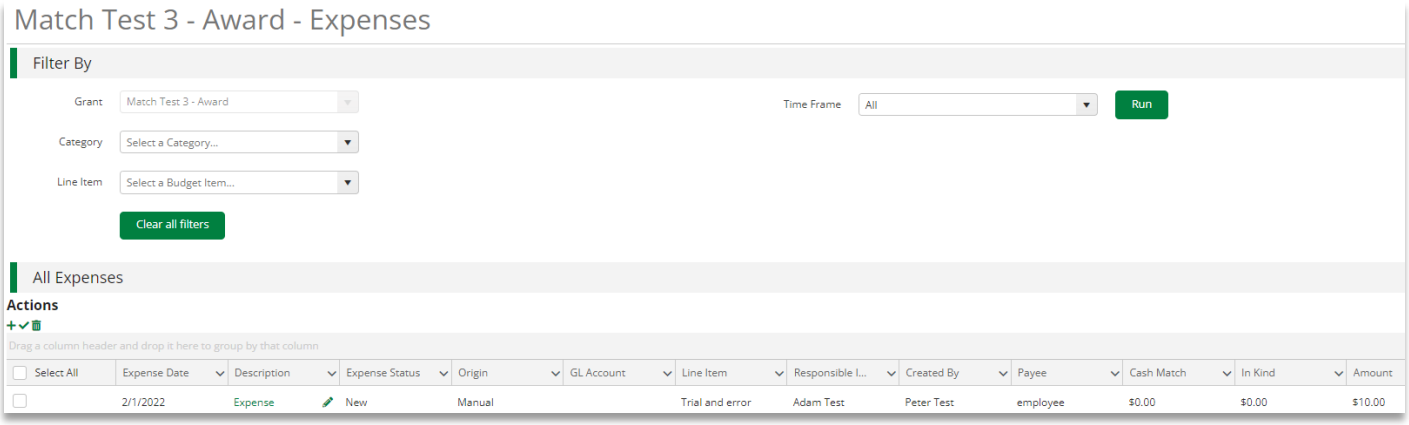
If there is a Match, this is where it will be entered. This can be done by dollar amount or percentage.

Attachments Tab



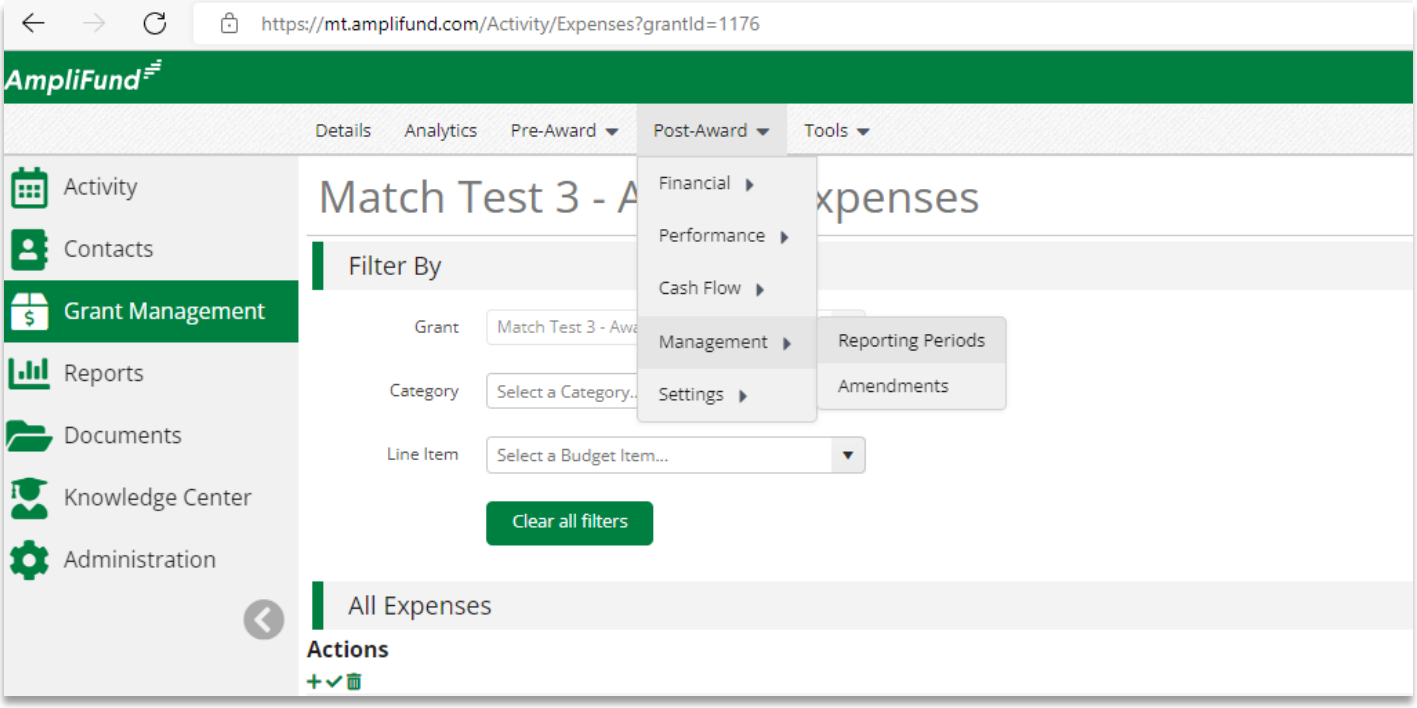
Upload all backup documentation for the entered expenses here. If you have fringe and personnel upload the backup to both Fringe and Personnel expense lines.

Once you have entered all the information onto each of the tabs click on create (this can be done from any of the tabs). Continue entering all the expenses that you need to submit for this period by repeating this process for each expenditure type. Please keep everything in each budget category (ex, Supplies, Personnel, Fringe, Other) as you enter the expenses.

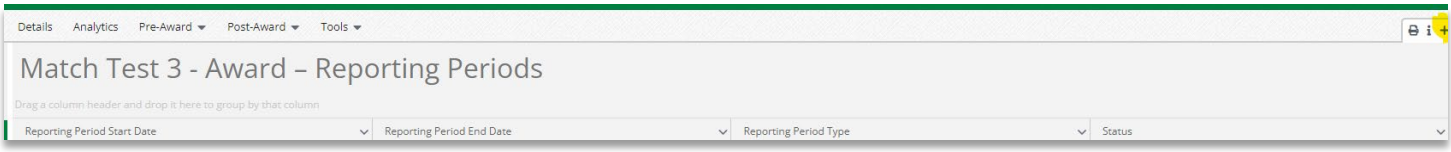


Creating Reporting Period

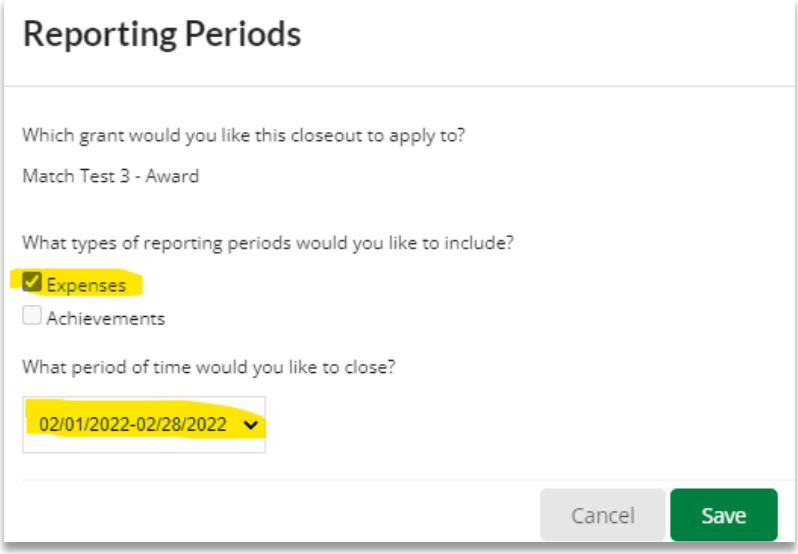
1. Click on Post Award, hover over Management, click on Reporting Periods.



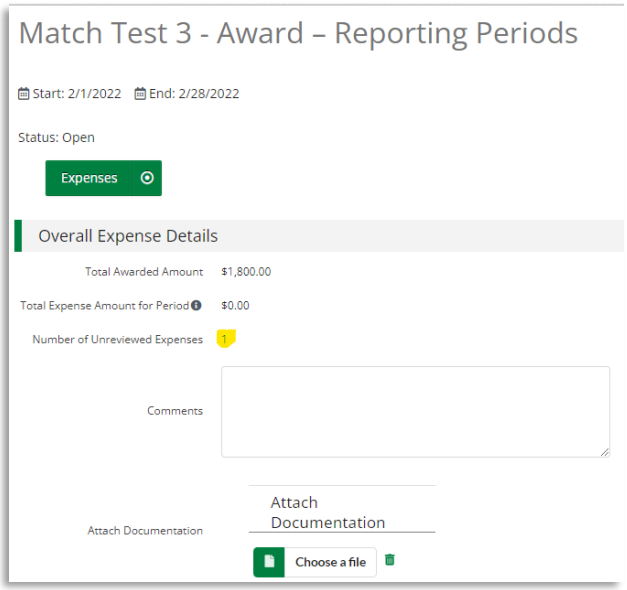
2. Click on the +



3. Check mark expenses, select the time period from the drop down (these were entered by MBCC), click on Save

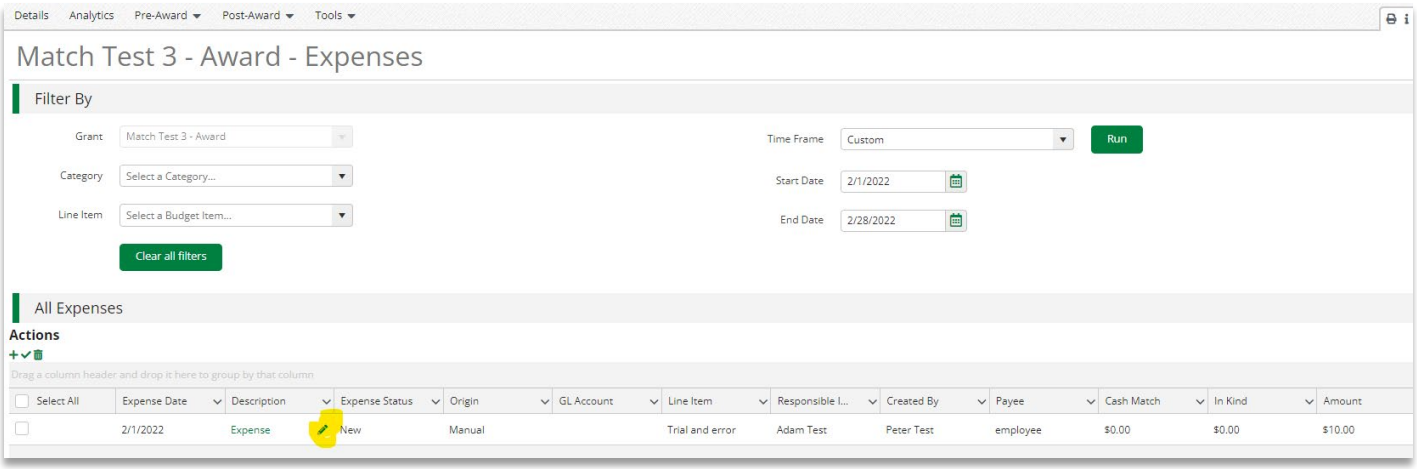


4. Click on the number of unreviewed expenses

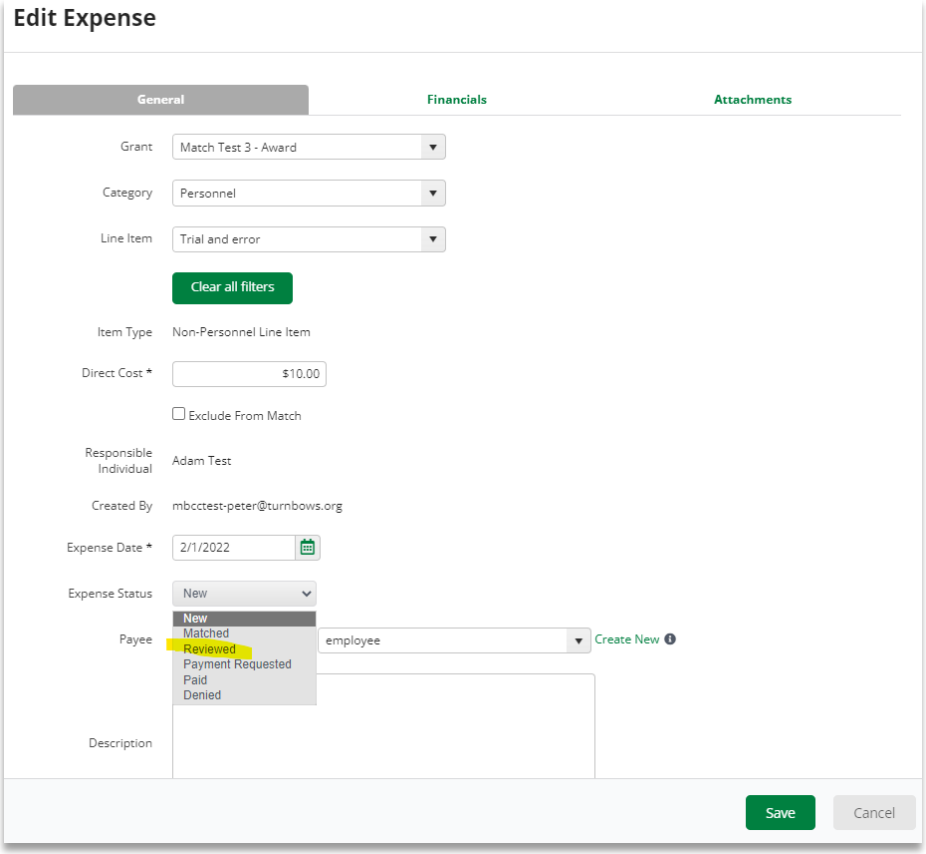


5. Enter time frame and click Run

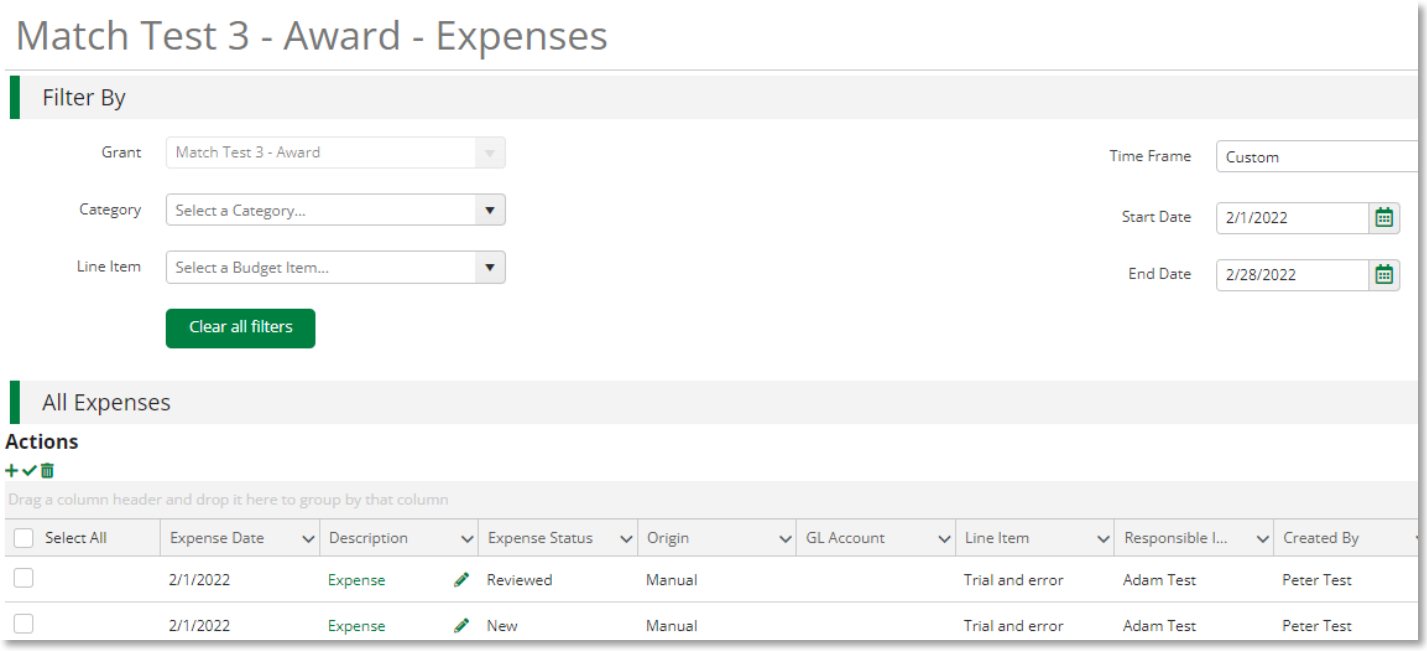
6. Click on edit (the pencil)



7. Review each Tab (General, Financials, Attachments) to verify the information entered is correct. Once all information has been verified, on the General Tab, change the Expense Status from new to reviewed. This is done by clicking on the arrow under Expense Status, change from New to Reviewed. Click on Save. You will repeat this for each expense line, verifying the information and changing the expense status from new to reviewed. Anything not marked as reviewed will not attach to the reporting period when closed in the upcoming steps.

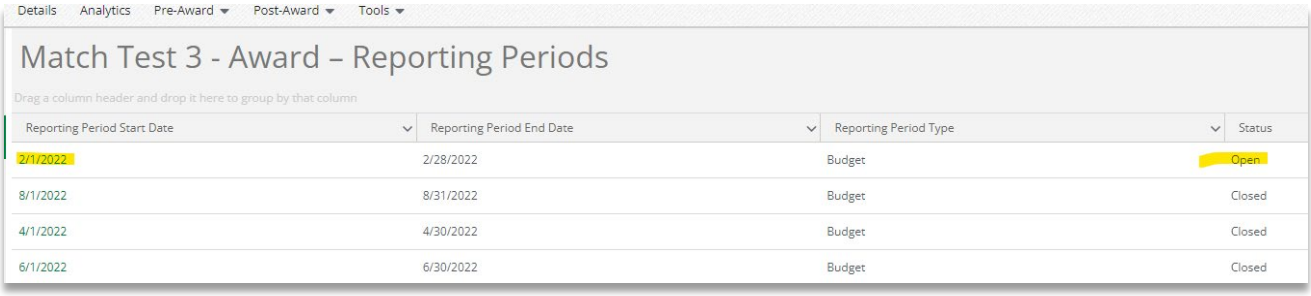


8. You will repeat this for each expense line, verifying the information and changing the expense status from new to reviewed. Anything not marked as reviewed will not attach to the reporting period when closed in the upcoming steps.

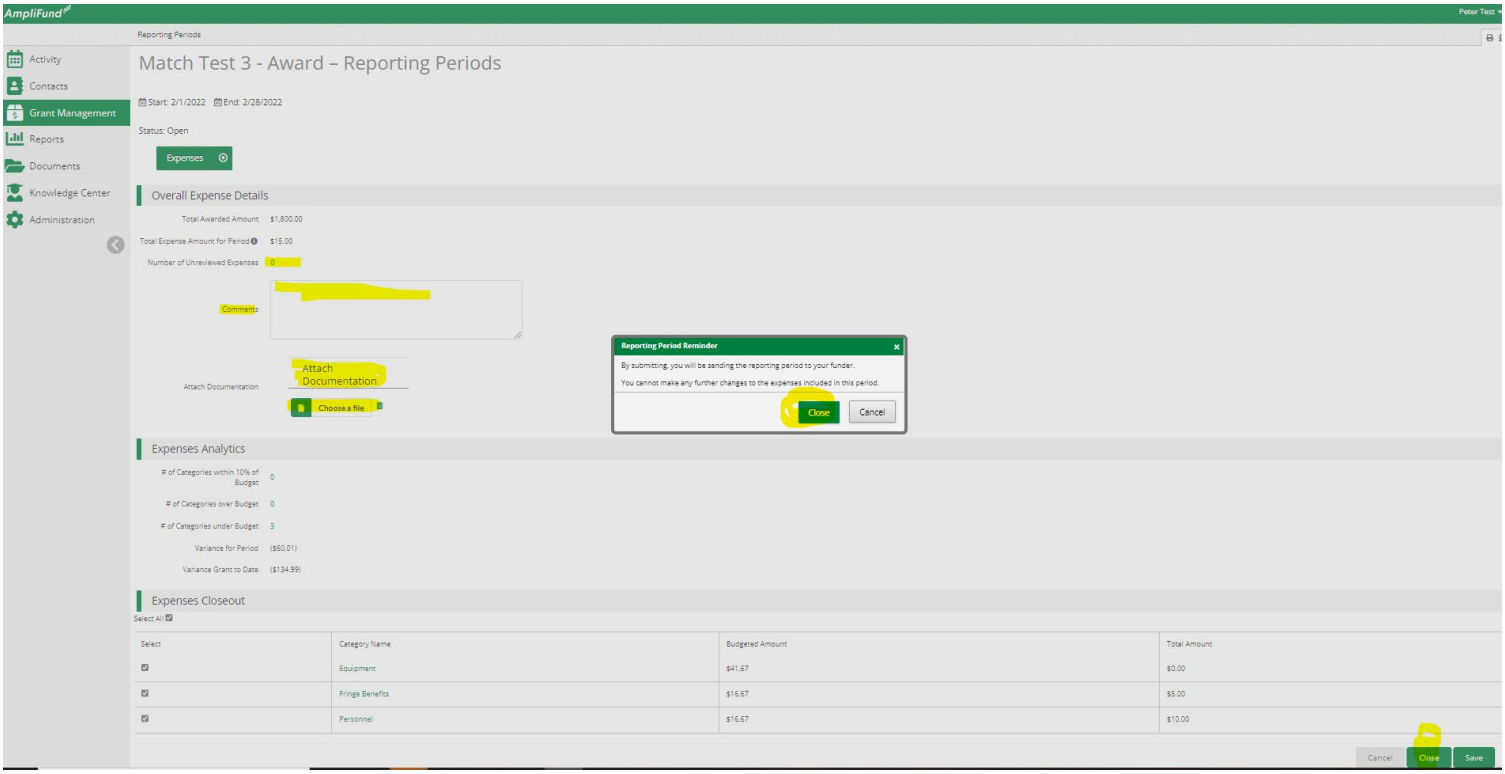


After all the expenses have been updated to Reviewed, the reporting period needs to be closed.

9. Click on Post Award, hover over Management and click on Reporting Periods. Click on the Reporting Period that you want to close.

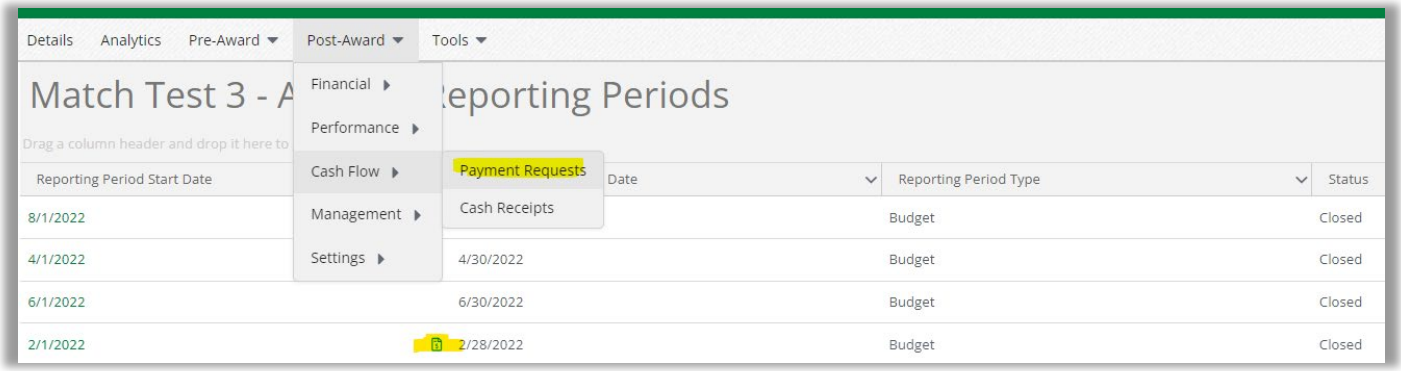


10. The number of unreviewed expenses should be 0. If you have any additional comments or documents, they can be attached here. Scroll to the bottom of the page and click Close, Close. If you click on save this will only save the information for you to work on later and the reporting period will not be closed to attach to the payment request in the next step.



Payment Request

1. From the main screen click on Post Award, hover over Cash Flow, click on Payment Request.



2. Click on the (+).
3. Fill in the following Fields

   - Enter the Payment Request Name
     Format should be Grant Award, then period ending (month or Qtr ending date)
     Example MT01-1176 Period Ending 2.28.22
   - Date Created (it will default to today's date)
   - Related Reporting Period – This is where the reporting period will be attach that was created in the previous step
   - DO NOT ADD ADDITIONAL EXPENSES HERE
   - Review Net Costs
   - Enter Requested Amount (Net Total and Request Amount need to be the same)
   - Additional comments can be entered here along with additional attachments
4. Click Submit, Submit

   This will send the request to MBCC to review

   If you select Create the Payment Request will be saved to edit later and will not be sent to MBCC

Match Test 3 - Award – Match Test 3 ending 02282022

Organization and Grant Information

Funder Organization: Montana Board of Crime Control

Grant Name: Match Test 3 - Award

Payment Request Information

Payment Request Name *: Match Test 3 ending 02282022

Date Created *: 8/18/2022

Related Reporting Period(s): Period ending 2/28/2022 ✕

Expenses From: 2/1/2022 To: 2/28/2022

Payment Type: Reimbursement

Payment Request Status: Not Submitted

Financial Detail

Costs

Fringe Benefits: $5.00

Personnel: $10.00

Additional Expenses: Select budget categories...

Net Costs: $15.00

Contributions

Match Contribution: $0.00

Net Contribution: $0.00

Totals

Net Total: $15.00

Requested Amount*: $15.00

Remaining Grant Balance: $1,980.00

Additional Information

Comments:

Attachments: Choose file(s)

Create | Submit | Cancel