Payment Updates – February 2023

Who does this change impact?

1. *Recipients who enter expenses & submit payment requests to their funder via AmpliFund*
2. *Grant Makers who enter expenses or review payment requests*
3. *Grant Seekers who enter expenses & leverage the payment request functionality*

What is Changing?

Expense records can be added directly to a payment request to reduce steps and improve user experience. Funders can add expenses to requests submitted by their recipients during the review process if Expense edit permissions are enabled. The "Additional Expenses" option on the payment request has been removed.

When is the Change?

February 24th, 2023

How does this impact the steps we / recipients take?
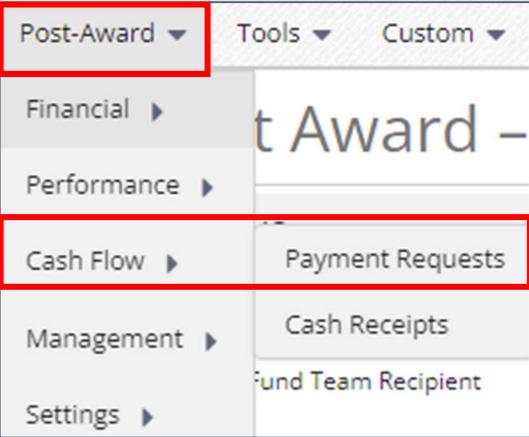
Customers who use Reporting Periods:

No changes are needed to current business processes. If a recipient mistakenly enters an expense directly on the payment request, they will have to navigate back to the reporting period to include the expense in the reporting period, then link the reporting period to the request.

Customers who do not use Reporting Periods:

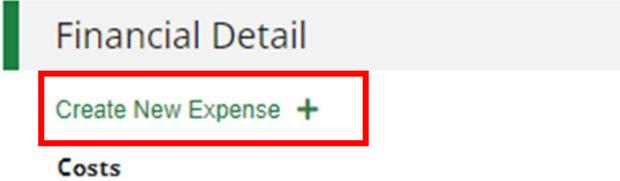1 – Navigate to your Grant (Grant Management>Grants>Click on Name)
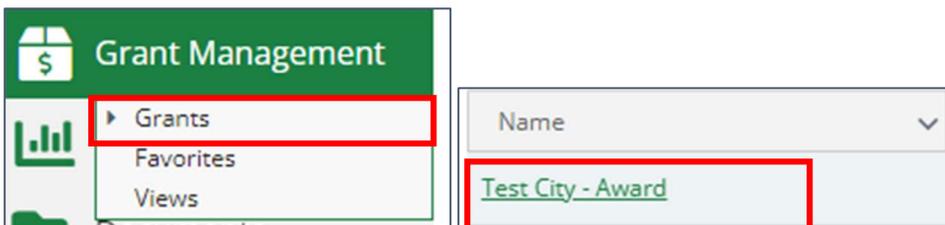
2 – Navigate to Payment Requests (Post-Award>Cash Flow>Payment Requests)

3 – Enter the dates From and To, for the payment request (inclusive of any expense dates)

4 – Click on Create New Expense

5 – Enter Expense Details (Note: the expense is now automatically in a status of Reviewed)

Grant	City Improvement Award
Category	Construction ▼
Line Item	Park Construction ▼
	Clear all filters
Item Type	Non-Personnel Line Item
Direct Cost *	$150.00
	☐ Exclude From Match
Responsible Individual	Name Last
Created By	enaufel@streamlinksoftware.com
Expense Date *	11/7/2022 📅
Expense Status	Reviewed ▼
Payment Status	New

> Expense date defaults to entry date, remember to change to the actual date of the expense.

Adding Expenses to a Submitted Request as a Funder

When reviewing a payment request, click on Create New Expense

Note expense date must be within the payment request date range

Test Award for Excellence – Thrid Qtr 2019-2020

Organization and Grant Information

Recipient Organization	Test Lead Recipient - Lifecycle
Grant Name	Test Award for Excellence

Payment Request Information

Payment Request Name	Thrid Qtr 2019-2020
Date Created	8/1/2020
Related Reporting Period(s)	Period ending 3/31/2020
Expenses From	3/1/2020 To 3/31/2020
Payment Type	Reimbursement
Date Submitted	8/5/2020
Submitted By	Joe Test Applicant

Financial Detail

Create New Expense +

	Total	Cash Match	In-Kind Match	Match	Grant Funded
Consultants/Contracts	$2,500.00	$0.00	$0.00	$0.00	$2,500.00
Equipment	$1,500.00	$0.00	$0.00	$0.00	$1,500.00
Indirect	$0.00	$0.00	$0.00	$0.00	$0.00
Net Costs	**$4,000.00**	**$0.00**	**$0.00**	**$0.00**	**$4,000.00**
Fringe Benefits	$0.00	$0.00	$0.00	$0.00	$0.00
Personnel	$0.00	$0.00	$0.00	$0.00	$0.00

Save Approve Reject