**Grant Budget and Expenses**

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| Script |
| Welcome to the AmpliFund recipient series video focused on the grant award budget and entering expenses. |
| To access your grant award budget in AmpliFund, you would navigate to Grant Management, then Grants. Once you land on your list of grant awards, click on the relevant grant name. When you are in the grant award details, you can then click on Post Award>Financial then Budget. This will allow you to review the budget categories and line items set up by your funder. |
| To enter expenses in AmpliFund, there are 3 key ways you can access the expense entry screen. The first is from the budget where we just navigated to. In the budget you can click on the dollar sign to enter expenses against that particular line item. Another option is from the Post Award drop down at the top of the Award Details page. You can click on Post Award> Financial>Expenses. The final way is from the Activity menu, where you can click on Expenses. |
| Entering expenses is the first step in generating a payment request or invoice to your funder. Other steps of the payment request process will be covered in recipient videos on the AmpliFund support site. |
| Let’s hop into AmpliFund, review our budget and enter an expense together. From the calendar, click on Grant Management, then Grants. |
| Select your applicable grant from the list by clicking on the name. |
| Click on Post Award>Financial>Budget. |
| This will take you to your budget page, where you can review the categories and line items set by your funder. At the top you can toggle on additional columns using the check boxes. In Green and bold are the budget categories. If you hover over the budget category name you can see the total amount allocated by your funder to that category. Underneath each category may be one or more line items, the line items will have a grant funded amount and may have a match amount if there is match included in your grant. The grant funded plus the match amount equal the total cost column. Each budget category will display a subtotal and then the budget will total at the bottom of the screen. If your funder has allowed you the ability to edit the budget you will have a pencil icon available next to each line item and category to edit. |
| If you click on a line item name, you can view additional details set by your funder about that line item. On the general tab you can see the cost information and the responsible individual. |
| On the financials tab you can view the match details if applicable and the allocation details for the line item by year or month. |
| The configuration tab may include any expense caps or spending alerts your funder has set up. These may or may not be used for your award. |
| Finally the attachments tab would contain any documents uploaded by your funder. There may or may not be documents present in this area, as this is an optional area your funder may use. If a document is present you can download and view any files by clicking on the name. |
| Next let’s add an expense together. At the top of our screen, I’ll click on Post Award>Financial>Expenses. |
| This will take you to the expense entry page. From this page you can view any expenses that have already been entered by award and enter new expenses. First let’s add a new expense. I’ll click on the plus icon. |
| This will take you to the expense entry screen. Your grant award is pre-selected from the budget, but you can use the drop down if you need to change to a different award. Use the category and line item drop downs to select the appropriate category and line item. Enter your total expense amount including any match under the direct cost section. If the expense does not have match you can use the exclude from match check box or you can leave that blank, but then may need to update the financials tab based on the line item settings. Adjust the expense date to reflect the appropriate expense date. The next field is expense status. If your funding agency has asked you to use reporting periods to submit your expenses, change the expense status to reviewed. How to generate a reporting period is reviewed in another video on the AmpliFund support site. In the description field you can add additional text about your expense. Reference any documentation provided by your funder for expense requirement specifics that may need to be filled in on the expense record. |
| On the financials tab, you may need to update the match and in kind details for the expense. If there is a match or in kind amount for this expense you can enter it as a dollar value or a percentage. |
| Finally on the attachments tab, you can upload any relevant documentation. Any files you upload here will be visible to your funder. Once you are done entering all relevant information on the expense for your funder, click on Create. |
| After you enter an expense you can view it on the expense details page. To go back into the expense and edit, you can use the pencil icon. If your funder is having you use reporting periods, after an expense is included in a closed reporting period you will not be able to edit the expense details. You can use the check boxes at the top to add additional details to the grid, such as the created date. |
| If you navigate back to the grant award details page, you can track total expenses in the financial fields that populate on the award. The Expenses to Date field will populate with the sum of all expenses you’ve entered against that particular award. |
| Through this AmpliFund Recipient series video, you’ve learned how to review your grant award budget and enter an expense for your grant award. Should you have any additional questions, please reference our support site. Thank you! |