**Script - Payment Requests: Approval and Rejection**

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| Script |
| Welcome to the AmpliFund grant maker training series focused on Payment Requests, the approval and rejection steps. |
| There are 3 ways to access a submitted payment request.  First the assigned grant maker grant manager will receive an automatic email notification from AmpliFund when the recipient has submitted a payment request.  There is a direct link in the email notification.  Next, users can access payment requests via the Activity Center by clicking on Activity then Payment Request Approvals.  Finally, users can access payment requests via the Post Award menu in the relevant award. |
| To approve a payment request, follow your internal business process for reviewing.  If you are ready to approve the payment request, click on the edit pencil next to the payment request name.  Confirm or edit the approved amount, the field will default to the amount submitted by the recipient.  Click the green Approve button in the bottom right hand corner.  When the pop-up window appears type APPROVE and click approve again.  Once you approve a payment request an automatic notification will be sent to the recipient grant manager.  Please note that once a payment request is approved users cannot change their decision on the request. |
| If you want to reject a payment request, click on the edit pencil to edit the payment request.  Add notes or details for the recipient if applicable then click the red reject button in the bottom right hand corner.  When the pop-up window appears type REJECT and click reject again.  Once you reject a payment request an automatic notification will be sent to the recipient grant manager.  Please note that once a payment request is rejected users cannot change their decision on the request. |
| If your business process includes the recipient submitting reporting periods and they need to edit expenses as part of the rejected payment request, you must also reject the linked reporting period.  To reject the linked reporting period, navigate to Post Award>Management>Reporting Periods or access the reporting periods via the activity center.  Select the relevant reporting period by clicking on the reporting period start date.  Scroll to the bottom of the reporting period and click the red reject button in the bottom right hand corner.  When the pop up window appears, click reject again.  An automatic email notification will be sent to the recipient grant manager and the related expenses will go back to a “reviewed” status and can be edited by the recipient. |
| Let’s go into AmpliFund and review the approval and rejection steps in the system.  From the calendar, click on Activity then Payment Request Approvals |
| Click on the relevant grant name. |
| This will take you to all the payment requests associated with that award.  Click on the edit pencil next to the payment request you want to approve or reject. |
| Review the payment request as necessary.  If there is a linked reporting period you can click on the reporting period ending date to navigate to the reporting period and review it. |
| Towards the bottom of the screen there are two spots for comments.  Internal comments will remain with the payment request record and are visible only to your organization as the grant maker.  The external comments will remain with the payment request and are visible to the recipient. |
| Also at the bottom of the payment request screen is the payment request history.  This section shows the full activity log of the payment request, including creation and submission by the recipient.  When the payment request is saved, approved or rejected those additional steps will be added to the payment request history section. |
| At the bottom right hand corner of the screen there are 4 options.  Save – this will save the payment request with any comments you have made.  Approve, this will trigger a popup window for you to confirm your approval and then if confirmed will send an automatic notification to the recipient of their approved payment request.  Please note that once a payment request is approved users cannot change their decision on the request.  The next option is reject, this will also trigger a pop-up window for you to confirm your rejection and then will send an automatic notification to the recipient grant manager of a rejected payment request.  Please note that once a payment request is rejected users cannot change their decision on the request.  The final option is to cancel, which will return you to the main payment request screen and will not save any changes you’ve made to the payment request record. |
| If you’ve rejected the payment request and as part of your business process recipients submit reporting periods, you must also reject the related reporting period for the recipient to have access to edit expenses.  To take this action, click on Post Award> Management> Reporting Periods |
| The reporting periods screen will display all closed and rejected reporting periods.  Click on the reporting period start date for the related reporting period you want to reject. |
| Scroll down to the bottom of the screen and click on the red Reject button to reject the reporting period. |
| A pop-up window will appear for you to confirm your rejection.  Once a reporting period has been rejected the recipient grant manager will receive an automatic email notification from AmpliFund. |
| Through this grant maker training series video you’ve learned about the approval and rejection process for payment requests.  Should you have additional questions please reference our support site.  Thank you! |