

How to Add Expenses into AmpliFund

Expenses are charges spent against a planned grant budget line item. If an expense exceeds a line item's spending alert, the Grant Manager will receive an email notification. If an expense exceeds a line item's expense cap, it cannot be added.

1. Open **Grant Management>Grants>All Grants**.
2. Click **FY24 ORC**.
3. Open the **Post-Award tab>Financial>Budget**.
4. Under **Options > Check the Line Item box to see the budget details**.
5. Next, click the **\$ (Expenses icon)** next to a line item to add an expense.
6. Click the **+(Create icon)** under **Actions**.



7. Add the **Direct Cost** amount.
8. Select an **Expense Date**. Enter in the date that the expense was incurred.
9. Select the **Expense Status >Reviewed**: The expense has been reviewed
10. Add a **Description** (optional).
11. Click **Save**.

Repeat these steps for each line item that you are reporting an expense on within the quarter.

How to Add Achievement Narrative into AmpliFund

A grant's performance is measured by achievements against goals.

1. Open **Grant Management>Grants>All Grants**.
2. Click **FY24 ORC**.
3. Open the **Post-Award tab>Performance>Performance Plan**.
4. Click the **+(Achievements icon)** next to a goal name.



5. Click the **+(Create icon)** in the *Icon Bar*.
6. Add **Achievement Date**.
7. Add achievement information > attach a narrative that highlights the impact the awarded funds contributed to combating retail crime during the quarter.



8. Click **Save**.

How to Create and Close a Reporting Period

Closing a reporting period will send the report to the funder for review.

Once closed, users may not edit any expenses or achievements within the closed reporting period. The reporting period can only be reopened if rejected by the funder.

1. Open **Grants Management>Grants>All Grants**.
2. Click a **FY24 ORC Grant**.
3. Open the **Post-Award tab>Management>Reporting Period**.
4. Click **+(Create)**.
5. Select **Expenses and Achievements**.
6. Select **Reporting Period time period**
Q1: 7/1/2023-9/30/2023
Q2: 10/1/2023-12/31/2023
Q3: 1/1/2024-3/31/2024
Q4: 4/1/2024-6/30/2024
7. Click **Save**.
8. Click the **reporting period start date**.
9. Click **Close** to close the reporting period that you are wanting to submit to your funder.
10. In the confirmation pop-up window, click **Close**.